



# ***STIC Search Report***

***EIC 3600***

**STIC Database Tracking Number: 96194**

**TO: Elaine Gort  
Location: pk7 B21  
Art Unit : 3627  
Friday, June 13, 2003**

**Case Serial Number: 09/588534**

**From: Sylvia Keys  
Location: EIC 3600  
PK5-Suite 804  
Phone: 305-5782**

**[sylvia.keys@uspto.gov](mailto:sylvia.keys@uspto.gov)**

## **Search Notes**

Dear Elaine,

Please read through the results.

If you have any questions, please do not hesitate to contact me.

Sylvia

(31)

# EIC2100 COMMERCIAL DATABASE SEARCH REQUEST

Staff Use Only

## Complete 705 Template Search Requested

☐ RUSH - SPE signature required: \_\_\_\_\_

Access DB#

96/94

Business Methods Case: 705/ ~~18~~ 19

Log Number

Write in 705 subclass(es) to search required files for 705 cases or cases cross referenced in 705.

Requester's Full Name: Elaine Gort Examiner #: 77459 Date: 6/9/03

Art Unit: 3627 Phone Number 703/308-6391 Serial Number: 9/588,534

Bldg & Room #: PK5 7B21

Results Format Preferred: PAPER

If more than one search is submitted, please prioritize searches in order of need.

Provide the PALM Bib page or the following:

Title of Invention: see attached bib sheet

Inventors (provide full names): See attached

Earliest Priority Filing Date: 6/7/00

Requested attachments:

- If possible, provide the cover sheet, the IDS, examples, or relevant citations, authors, etc, if known.
- Please attach copies of the parts of this case that help explain or are most pertinent to this search. Examples are:  
abstract, background, summary, claim(s) [not all of the claims].

See particularly claims 1

The claimed or apparent novelty of the invention is:

Veri.f.cation of taxes calculated on a  
hold bill

05-09-03P02:42 RCVD

This search should focus on:

(Also include keywords or synonyms)

Same as above

.....  
Special Instructions or Other Comments

?ds

Set	Items	Description
S1	138	(CUSTOMER? OR CLIENT?) ( ) (BILL? ? OR INVOICE? OR ACCOUNT OR ACCOUNTS OR BILLING? OR CHARGE? ?) OR HOLD ( ) BILL?
S2	50068	(ELECTRONIC OR AUTOMAT? OR DIGIT? OR COMPUTER? OR MECHANIZ? OR MECHANIS?)
S3	234	S2 (3N) (SPREADSHEET? OR LEDGER? OR WORKSHEET? OR (SPREAD OR WORK) ( ) SHEET?)
S4	152	(CALCULAT? OR VERIF? OR COMPAR?) (5N) (TAX? ? OR TAXATION?)
S5	2	S1 AND S3
S6	4	S1 AND S4
S7	4	S6 NOT S

5/5/1

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
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00072110 DOCUMENT TYPE: Review

**PRODUCT NAMES:** cc:Mail (016699); 1-2-3 (004738); NetWare (699683);  
Quattro Pro (481319); Microsoft SQL Server (259748)

**TITLE:** Legal Eagles Capitalize on LAN and On-Line Data

**AUTHOR:** Binda, Lawrence A

**SOURCE:** Open Systems Today, v161 p52(1) Oct 10, 1994

**ISSN:** 1061-0839

**RECORD TYPE:** Review

**REVIEW TYPE:** Product Analysis

**GRADE:** Product Analysis, No Rating

A corporate law firm uses Lotus's cc:Mail to network its computing tasks, replacing dumb terminals with NetWare servers and an IBM token ring backbone network. LAN applications used include database, financial accounting, document and image management, and **customer billing** products. Shrink-wrapped products in use include 1-2-3, Quattro Pro, WordPerfect, and the ProComm communications package. Microsoft SQL Server and SuperBase manage data, and Cofax supports imaging. The time-saving imaging system runs on its own LAN, using vintage PC clones linked to a Compaq server. It eliminates task repetition, document copying, document loss, and document mismatches. E-mail supports communication among legal staff and clients alike, all of whom are connected via an Internet gateway or information service.

**COMPANY NAME:** Lotus Software Group (254975); Novell Inc (344893); Corel Corp (421723); Microsoft Corp (112127)

**SPECIAL FEATURE:** Charts

**DESCRIPTORS:** 1-2-3; Communications; E-Mail; LANs; Law Firms; Legal; NetWare; Network Software; Office **Automation** ; **Spreadsheets** ; SQL Server; Word Processing

**REVISION DATE:** 20030527

5/5/2

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
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00060555 DOCUMENT TYPE: Review

**PRODUCT NAMES:** WordPerfect 6.0 DOS (002094)

**TITLE:** An Integrated Timekeeping and Billing System with WordPerfect 6.0

...

**AUTHOR:** Midkiff, David W

**SOURCE:** Perfect Lawyer, v4 n10 p7(13) Jan 1994

**ISSN:** 1049-3964

**HOME PAGE:** <http://www.rpwpublishing.com>

**RECORD TYPE:** Review

**REVIEW TYPE:** Product Analysis

**GRADE:** Product Analysis, No Rating

Some of the lesser-known features of WordPerfect 6.0 for DOS can be used to reduce the time required of an attorney to maintain time sheets and prepare bills to send to clients. A method is presented to automate time and expense recording, as well as bill creation, completely within WordPerfect. This can be created using WordPerfect's table feature, along with hypertext, hidden text, auto replacement, and some useful macros. The

speller's auto-replace function can expand abbreviations that are often used by attorneys to record time entries. Creating and formatting tables in WordPerfect must be learned, but once a table is created, it can be used as a template for future **client bills**. Sophisticated **spreadsheet** options create an **automated** invoicing system, and the table is integrated with the text portion of the **client invoice**. Hypertext options can allow the attorney to jump back and forth between previous bills for further examinations.

COMPANY NAME: Corel Corp (421723)

DESCRIPTORS: DOS; IBM PC & Compatibles; Law Firms; Professional Time & Billing; Table Formatting; Word Processing; WordPerfect

REVISION DATE: 20020930

?

7/5/1

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
(c)2003 Info.Sources Inc. All rts. reserv.

01486183 DOCUMENT TYPE: Product

**PRODUCT NAME: Order Entry System 7.0 (486183)**

Legler Systems Co (567183)  
23 Charles Hill Rd  
Orinda, CA 94563 United States  
TELEPHONE: (925) 254-1264

RECORD TYPE: Directory

CONTACT: Sales Department

Order Entry System 7.0 supports multiple users in an online environment. The printed reports include order edits, product lists, **customer invoices**, order confirmations, sales analyses, sales tax reports, and shipping labels. The online screen displays include a query of a specific order; an inquiry by ship-to name; an inquiry of customer order history; and pop-up help windows. The free demo disk shows the user-friendly operational and control features of the system including laser printer support. The software can handle a customer deposit at the time an order is taken. It **calculates sales tax** based upon the item (for example, no sales tax for handling) and the customer (for example, no sales tax for resellers). The program can print comments on order confirmations and **customer invoices** and can provide credit checking against a predefined limit in the Customer Master Record.

DESCRIPTORS: Accountants; Order Entry; Order Fulfillment; Sales Analysis;  
Small Business

HARDWARE: IBM PC & Compatibles; IBM RS/6000  
OPERATING SYSTEM: AIX; DOS; NetWare; Windows; Windows NT/2000  
PROGRAM LANGUAGES: COBOL  
TYPE OF PRODUCT: Mini; Micro; Workstation  
POTENTIAL USERS: Accounting, Cross Industries, Small and Midsize  
Businesses  
DATE OF RELEASE: 12/1991  
PRICE: \$1,295 and up; source code available at additional cost; demo disk  
available; includes support

DOCUMENTATION AVAILABLE: Reference manuals; user manuals; source code;  
online documentation  
TRAINING AVAILABLE: On-site training; technical support; telephone support  
SERVICES AVAILABLE: Consulting; conversion; custom programming  
REVISION DATE: 20020127

7/5/2

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.  
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01479977 DOCUMENT TYPE: Product

**PRODUCT NAME: Bottom Line Accounting 2000 (479977)**

WindSoft International Inc (569992)  
PO Box 692005  
Orlando, FL 32869-2005 United States  
TELEPHONE: (407) 355-0800

RECORD TYPE: Directory

CONTACT: Sales Department

Bottom Line Accounting 2000 (BLA2000) consists of General Ledger, Account Reconciliation, Financial Utilities, Accounts Receivable, Accounts Payable, Payroll, POS and Inventory modules. Users can purchase kits or run them as an integrated system. The general ledger module lets users set budgets, **compare** expenses, keep track of **tax** deductions, record all transactions, and **calculate** their net worth. Users can produce general journals, income statements, account lists, balance sheets, and budget listings by month, quarter, year, or year-to-date. Users can store unlimited transactions per year. The account reconciliation module runs with the general ledger module and enables users to balance bank statements, keep track of outstanding checks, verify charge card transactions, and produce automatic balance statements. The financial utilities module helps users make calculations, create a depreciation schedule for assets, and calculate loan payments. Users can produce loan amortization schedules and calculate present and future values of annuities. With the accounts receivable module, users can calculate finance charges, print **customer invoices**, statements, reports, and mailing labels and produce cash flow forecasts. Reports provided include accounts receivable journals, open-item statements, **customer invoices** and a schedule of receivables. The accounts payable module lets users maintain a permanent record of purchases and print checks, vendor lists, and mailing labels. Inventory and POS are suitable for retail stores and service industries. Payroll provides complete control of federal, state, FICS, FUTA, or SUTA. It prints 1099s, 941s, and W-2s. All modules integrate completely into the general ledger. The system is designed to be easy to install and requires little computer knowledge. No-month-end-closings are supported and errors can be easily corrected. After-the-fact accounting is allowed and pop-up, online help screens are featured.

DESCRIPTORS: Accounting; Accounts Payable; Accounts Receivable; Financial Reporting; General Ledger; Inventory; Payroll; Point of Sale; Retailers ; Small Business

HARDWARE: IBM PC & Compatibles  
OPERATING SYSTEM: Windows; Windows NT/2000  
PROGRAM LANGUAGES: Delphi  
TYPE OF PRODUCT: Micro  
POTENTIAL USERS: Small to Medium Size Businesses  
DATE OF RELEASE: 01/1991  
PRICE: \$99; includes 30 days support

NUMBER OF INSTALLATIONS: 55000  
DOCUMENTATION AVAILABLE: Tutorials; user manuals  
TRAINING AVAILABLE: On-site training; training at additional cost; technical support; telephone support; fax support; e-mail support  
SERVICES AVAILABLE: Custom programming  
REVISION DATE: 20020127

7/5/3

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
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01006567 DOCUMENT TYPE: Product

PRODUCT NAME: TAX/PACK Professional 1040 (006567)

Alpine Data Inc (242306)  
737 S Townsend Ave  
Montrose, CO 81401 United States  
TELEPHONE: (970) 249-1400

RECORD TYPE: Directory

CONTACT: Sales Department

TAX/PACK Professional 1040 is a complete 1040 tax preparation system designed for use by CPAs, tax practitioners or individuals to produce complete and accurate tax returns. It offers 1040, 1040A, 1040ES and 61 other forms and schedules plus extras such as Client Proforma with year to year transfer, Client Management, **Client Billing**, Cover Letters, Pop-Up- **Calculator**, Attachments, Loan Amortization, **Tax** Summary, Automatic Passive Loss, Mail Labels, Electronic Filing, Asset Tracking, Batch Printing and more. The system is menu driven and offers easy editing at any stage of return preparation. A question/answer format is followed with line numbers corresponding to the appropriate IRS line numbers. Data is entered once and passes automatically wherever it is required including the State option. Users can choose from 44 optional state modules. They can print returns in computer-generated formats.

DESCRIPTORS: Accountants; Income Tax; Tax E-Filing; Tax Return Preparation

HARDWARE: IBM PC & Compatibles

OPERATING SYSTEM: DOS

PROGRAM LANGUAGES: BASIC

TYPE OF PRODUCT: Micro

POTENTIAL USERS: CPAs and Tax Practitioners

DATE OF RELEASE: 01/1979

PRICE: \$560

NUMBER OF INSTALLATIONS: 650

DOCUMENTATION AVAILABLE: Included with package

TRAINING AVAILABLE: Technical support; modem support; telephone support

OTHER REQUIREMENTS: 640K RAM required

REVISION DATE: 20000530

7/5/4

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.

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00071496

DOCUMENT TYPE: Review

PRODUCT NAMES: Telecommunications Call Manager (TCM) 400 (541095)

TITLE: Systems Design & Development, Inc.'s TCM/400

AUTHOR: Daffron, Susan

SOURCE: Midrange Computing, v12 n7 p88(2) Nov 1994

ISSN: 1052-3561

HOME PAGE: <http://www.midrangecomputing.com>

RECORD TYPE: Review

REVIEW TYPE: Review

GRADE: A

Telecommunications Call Manager/400 (TCM/400), a call management product for the AS/400, monitors all incoming, outgoing, and station to station calls for call quantity, unauthorized use, and cost per call. The product interacts with the connected telephone switch and adds telecommunications cost data to a call record database. Costing is accomplished with referencing rates from the long-distance carrier, and **tax** is **calculated** with user-established **tax** tables. TCM/400 also charges calls to departments, using integrated **client billing** systems, if desired. TCM/400 is particularly adaptable to hospitality industry calling, with the ability to track guest calls and automatically add surcharges. The user can customize the product with maintenance screens, and reporting functions show calls by date, time, ownership, extension, and digits dialed. Other



File 348:EUROPEAN PATENTS 1978-2003/Jun W01  
(c) 2003 European Patent Office  
File 349:PCT FULLTEXT 1979-2002/UB=20030605,UT=20030529  
(c) 2003 WIPO/Univentio

?ds

Set	Items	Description
S1	2092	(CUSTOMER? OR CLIENT?) ( ) (BILL? ? OR INVOICE? OR ACCOUNT OR ACCOUNTS OR BILLING? OR CHARGE? ?) OR HOLD()BILL?
S2	918519	(ELECTRONIC OR AUTOMAT? OR DIGIT? OR COMPUTER? OR MECHANIZ? OR MECHANIS?)
S3	731	S2(3N) (SPREADSHEET? OR LEDGER? OR WORKSHEET? OR (SPREAD OR WORK) ( )SHEET?)
S4	533	(CALCULAT? OR VERIF? OR COMPAR?) (5N) (TAX? ? OR TAXATION?)
S5	6	S1(S)S3
S6	8	S1(S)S4
S7	8	S6 NOT S5

5/3,K/1 (Item 1 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
(c) 2003 WIPO/Univentio. All rts. reserv.

00868282 \*\*Image available\*\*

USING A PSEUDO-CLEC TO TEST OPERATIONAL SUPPORT SYSTEMS OF AN INCUMBENT  
LOCAL EXCHANGE CARRIER  
UTILISATION D'UNE PSEUDO-ENTREPRISE DE SERVICES LOCAUX CONCURRENTIELS  
(ESLC) EN VUE D'ANALYSER DES SYSTEMES DE SOUTIEN A L'EXPLOITATION D'UNE  
ENTREPRISE DE SERVICES LOCAUX TITULAIRE

Patent Applicant/Assignee:

KPMG CONSULTING INC, 1676 International Drive, McLean, VA 22102-4828, US,  
US (Residence), US (Nationality)

Inventor(s):

SEARS Raymond W III, 1676 International Drive, McLean, VA 22102-4828, US,

Legal Representative:

KENNERLY Christopher W (agent), Baker Botts L.L.P., Suite 600, 2001 Ross  
Avenue, Dallas, TX 75201-2980, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200201838 A2-A3 20020103 (WO 0201838)

Application: WO 2001US20762 20010626 (PCT/WO US0120762)

Priority Application: US 2000214927 20000626

Designated States: AE AG AL AM AT AT (utility model) AU AZ BA BB BG BR BY  
BZ CA CH CN CO CR CU CZ CZ (utility model) DE DE (utility model) DK DK  
(utility model) DM DZ EC EE EE (utility model) ES FI FI (utility model)  
GB GD GE GH GM HR HU ID IL IN IS JP KE KG KP KR KZ LC LK LR LS LT LU LV  
MA MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK SK (utility  
model) SL TJ TM TR TT TZ UA UG UZ VN YU ZA ZW  
(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR  
(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG  
(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW  
(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 69965

Fulltext Availability:

Claims

Claim

... numbers in specific ways. As an example, a certain test activity tool  
may provide an **electronic** or other **spreadsheet** (e.g., MICROSOFT  
ACCESS database) containing the specific phone numbers that are to be  
called...inverted exclamation mark)t to test CLEC 18. In general,  
completion notifications describe changes to **customer accounts** and  
charges ELEC 14 generates when making the changes. These one-time charges  
may also...

...received, the testing entity may create a test activity tool (described  
above) for the associated **customer account**. The testing entity may  
also obtain the CSR for the customer account to formulate expected...

...customer-level test cases, the testing entity examines all products and  
services associated with the **customer account** to verify that products  
and services the customer ordered appear on the bill and were...

5/3,K/2 (Item 2 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
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00806392

TECHNOLOGY SHARING DURING ASSET MANAGEMENT AND ASSET TRACKING IN A  
NETWORK-BASED SUPPLY CHAIN ENVIRONMENT AND METHOD THEREOF

**PARTAGE TECHNOLOGIQUE LORS DE LA GESTION ET DU SUIVI DU PARC INFORMATIQUE  
DANS UN ENVIRONNEMENT DU TYPE CHAÎNE D'APPROVISIONNEMENT RÉSEAUTÉE, ET  
PROCÉDÉ ASSOCIÉ**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

MIKURAK Michael G, 108 Englewood Blvd., Hamilton, NJ 08610, US,

Legal Representative:

HICKMAN Paul L (agent), Oppenheimer Wolff & Donnelly, LLP, 38th Floor,  
2029 Century Park East, Los Angeles, CA 90067-3024, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200139086 A2 20010531 (WO 0139086)

Application: WO 2000US32310 20001122 (PCT/WO US0032310)

Priority Application: US 99444653 19991122; US 99447623 19991122

Designated States: AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CR CU CZ DE

DK DM DZ EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR

LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK SL

TJ TM TR TT TZ UA UG UZ VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 156214

Fulltext Availability:

Detailed Description

Detailed Description

... rebates due to service level agreement violations, is-.collected and  
processed. Thereafter, in step 2604, **customer account** invoices are  
created for distribution based on the customer payment information and  
the billing data...Invoice and Collections Process 1504, utilizes the  
information from the Discounting Process 1306 to create **customer**  
**billing** information.

76

Contemporary telecommunication networks provide customers with the  
capability of using the general public...analog signals are converted to  
digital at the device and transmitted to the LEC as **digital**  
information.

Upon connection, the circuit guarantees that the samples can be delivered  
and reproduced by...

5/3,K/3 (Item 3 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00802534

**ANY-TO-ANY COMPONENT COMPUTING SYSTEM**

**SYSTEME INFORMATIQUE A COMPOSANTS TOUTE CATEGORIE**

Patent Applicant/Assignee:

E-BRAIN SOLUTIONS LLC, 1200 Mountain Creek Road, Suite 440, Chattanooga,  
TN 37405, US, US (Residence), US (Nationality), (For all designated  
states except: US)

Patent Applicant/Inventor:

WARREN Peter, 1200 Mountain Creek Road, Suite 440, Chattanooga, TN 37405,  
US, GB (Residence), GB (Nationality), (Designated only for: US)

LOWE Steven, 1625 Starboard Drive, Hixson, TN 37343, US, US (Residence),  
US (Nationality), (Designated only for: US)

Legal Representative:

MEHRMAN Michael J (agent), Paper Mill Village, Building 23, 600 Village Trace, Suite 300, Marietta, GA 30067, US,  
Patent and Priority Information (Country, Number, Date):  
Patent: WO 200135216 A2-A3 20010517 (WO 0135216)  
Application: WO 2000US31231 20001113 (PCT/WO US0031231)  
Priority Application: US 99164884 19991112  
Designated States: AE AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CR CU CZ DE DK DM DZ EE ES FI GB GD GE GH GM HR HU ID IL IN IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT TZ UA UG US UZ VN YU ZA ZW  
(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR  
(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG  
(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW  
(EA) AM AZ BY KG KZ MD RU TJ TM  
Publication Language: English  
Filing Language: English  
Fulltext Word Count: 275671

5/3,K/4 (Item 4 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
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00418748 \*\*Image available\*\*  
**SYSTEMS AND METHODS FOR SECURE TRANSACTION MANAGEMENT AND ELECTRONIC RIGHTS PROTECTION**  
**SYSTEMES ET PROCEDES DE GESTION DE TRANSACTIONS SECURISEES ET DE PROTECTION DE DROITS ELECTRONIQUES**  
Patent Applicant/Assignee:  
INTERTRUST TECHNOLOGIES CORP,  
Inventor(s):  
GINTER Karl L,  
SHEAR Victor H,  
SIBERT W Olin,  
SPAHN Francis J,  
VAN WIE David M,  
Patent and Priority Information (Country, Number, Date):  
Patent: WO 9809209 A1 19980305  
Application: WO 97US15243 19970829 (PCT/WO US9715243)  
Priority Application: US 96706206 19960830  
Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES FI GB GE GH HU IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ VN YU ZW  
GH KE LS MW SD SZ UG ZW AM AZ BY KG KZ MD RU TJ TM AT BE CH DE DK ES FI  
FR GB GR IE IT LU MC NL PT SE BF BJ CF CG CI CM GA GN ML MR NE SN TD TG  
Publication Language: English  
Fulltext Word Count: 195626

Fulltext Availability:  
Detailed Description

Detailed Description

... VDE

capabilities and makes such applications VDE aware (for example, word processors, database retrieval applications, **spreadsheets**, multimedia presentation authoring tools, film editing software, music editing software such as MIDI applications and...content usage information (reflecting usage-'of content by one or more parties other than such **customer**) relating to the creation, handling and/or manner of reporting of usage information received by...

5/3,K/5 (Item 5 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT  
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00344642

**SYSTEMS AND METHODS FOR SECURE TRANSACTION MANAGEMENT AND ELECTRONIC RIGHTS PROTECTION**

**SYSTEMES ET PROCEDES DE GESTION SECURISEE DE TRANSACTIONS ET DE PROTECTION ELECTRONIQUE DES DROITS**

Patent Applicant/Assignee:

ELECTRONIC PUBLISHING RESOURCES INC,

Inventor(s):

GINTER Karl L,  
SHEAR Victor H,  
SPAHN Francis J,  
VAN WIE David M,

Patent and Priority Information (Country, Number, Date):

Patent: WO 9627155 A2 19960906

Application: WO 96US2303 19960213 (PCT/WO US9602303)

Priority Application: US 95388107 19950213

Designated States: AL AM AT AU AZ BB BG BR BY CA CH CN CZ DE DK EE ES FI GB

GE HU IS JP KE KG KP KR KZ LK LR LS LT LU LV MD MG MK MN MW MX NO NZ PL

PT RO RU SD SE SG SI SK TJ TM TR TT UA UG UZ VN KE LS MW SD SZ UG AZ BY

KG KZ RU TJ TM AT BE CH DE DK ES FR GB GR IE IT LU MC NL PT SE BF BJ CF

CG CI CM GA GN ML MR NE SN TD TG

Publication Language: English

Fulltext Word Count: 207972

Fulltext Availability:

Detailed Description

Detailed Description

... various underlying agreements between parties that comprise this extended agreement. These agreements can define important **electronic** commerce considerations including.

- (1) security,
- (2) content use control, including electronic distribution,
- (3) privacy (regarding...

**5/3,K/6 (Item 6 from file: 349)**

DIALOG(R)File 349:PCT FULLTEXT

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00164744 \*\*Image available\*\*

**GENERIC TRANSACTION ACCOUNT SYSTEM**

**SYSTEME DE COMPTE DE TRANSACTIONS GENERIQUE**

Patent Applicant/Assignee:

HUMBLE David R,

Inventor(s):

HUMBLE David R,

Patent and Priority Information (Country, Number, Date):

Patent: WO 8911130 A1 19891116

Application: WO 89US1946 19890504 (PCT/WO US8901946)

Priority Application: US 88985 19880504

Designated States: AT AU BB BE BF BG BJ BR CF CG CH CM DE DK FI FR GA GB HU

IT JP KP KR LK LU MC MG ML MR MW NL NO RO SD SE SN SU TD TG

Publication Language: English

Fulltext Word Count: 6674

Fulltext Availability:

Detailed Description

Claims

Detailed Description

... transferred between the  
card and a system terminal; a central data file for storing  
a **customer account** log and a cumulative transaction ledger  
for each programmed card; and, a plurality of system  
terminals, each of the system terminals having means for  
reading the card and **automatically** updating the interim  
**ledger** as necessary and a user interface for controlling the  
terminal and for displaying information stored...

Claim

... transferred between the card and a system terminal;  
a central data file for storing a **customer account** log  
and cumulative transaction ledger for each programmed card;  
and,  
a plurality of system terminals, each of the system  
terminals, having means for reading the card and  
**automatically** updating the interim **ledger** as necessary and a  
user interface for controlling the terminal and for  
displaying information stored...

?

7/3,K/1 (Item 1 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
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00963611 \*\*Image available\*\*

**EXTENDED WEB ENABLED MULTI-FEATURED BUSINESS TO BUSINESS COMPUTER SYSTEM  
FOR RENTAL VEHICLE SERVICES  
SYSTEME INFORMATIQUE INTERENTREPRISES A ELEMENTS MULTIPLES A ACCES INTERNET  
POUR SERVICES DE LOCATION DE VEHICULES**

Patent Applicant/Assignee:

THE CRAWFORD GROUP INC, 600 Corporate Park Drive, St. Louis, MO 63105, US  
, US (Residence), US (Nationality), (For all designated states except:  
US)

Patent Applicant/Inventor:

WEINSTOCK Timothy Robert, 1845 Highcrest Drive, St. Charles, MO 63303, US  
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KLOPFENSTEIN Anita K, 433 Schwarz Road, O'Fallon, IL 62269, US, US  
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Legal Representative:

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1400, 7733 Forsyth Blvd., St. Louis, MO 63105-1817, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200297700 A2 20021205 (WO 0297700)

Application: WO 2001US51431 20011019 (PCT/WO US0151431)

Priority Application: US 2000694050 20001020

Parent Application/Grant:

Related by Continuation to: US 2000694050 20001020 (CIP)

Designated States: AE AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CO CR CU

CZ DE DK DM DZ EC EE ES FI GB GD GE GH GM HR HU ID IL IN IS JP KE KG KP

KR KZ LC LK LR LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PH PL PT RO RU

SD SE SG SI SK SL TJ TM TR TT TZ UA UG US UZ VN YU ZA ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GQ GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 237932

Fulltext Availability:

Detailed Description

Detailed Description

... OFFDRB (-R.-)

- AMSURD (CR-D)

- RAGBCHBT (-R--) TEXAS GOVT SURCHARGE TO PRINT FOR IIIInsurance

TYPE CUSTOMERS

@Constants.

'RECORD DELETED' is the message text for a value passed to AM105OV1 Add  
Maintenance...

7/3,K/2 (Item 2 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00933152      \*\*Image available\*\*

**EXTENDED WEB ENABLED MULTI-FEATURED BUSINESS TO BUSINESS COMPUTER SYSTEM  
FOR RENTAL VEHICLE SERVICES**

**SYSTEME INFORMATIQUE ETENDU ENTRE ENTREPRISES, A FONCTIONS MULTIPLES,  
FONCTIONNANT SUR LE WEB, POUR DES SERVICES DE LOCATION DE VEHICULES**

Patent Applicant/Assignee:

THE CRAWFORD GROUP INC, 600 Corporate Park Drive, St. Louis, MO 63105, US  
, US (Residence), US (Nationality), (For all designated states except:  
US)

Patent Applicant/Inventor:

WEINSTOCK Timothy Robert, 1845 Highcrest Drive, St. Charles, MO 63303, US  
, US (Residence), US (Nationality), (Designated only for: US)

DE VALLANCE Kimberly Amm, 2037 Silent Spring Drive, Maryland Heights, MO  
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HASELHORST Randall Allan, 1016 Scenic Oats Court, Imperial, MO 63052, US,  
US (Residence), US (Nationality), (Designated only for: US)

KENNEDY Craig Stephen, 9129 Meadowglen Lane, St. Louis, MO 63126, US, US  
(Residence), US (Nationality), (Designated only for: US)

SMITH David Gary, 10 Venice Place Court, Wildwood, MO 63040, US, US  
(Residence), US (Nationality), (Designated only for: US)

TINGLE William T, 17368 Hilltop Ridge Drive, Eureka, MO 63025, US, US  
(Residence), US (Nationality), (Designated only for: US)

KLOPFENSTEIN Anita K, 433 Schwarz Road, O'Fallon, IL 62269, US, US  
(Residence), US (Nationality), (Designated only for: US)

Legal Representative:

HAFERKAMP Richard E (et al) (agent), HOWELL & HAFERKAMP, L.C., Suite  
1400, 7733 Forsyth Blvd., St. Louis, MO 63105-1817, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200267175 A2 20020829 (WO 0267175)

Application: WO 2001US51437 20011019 (PCT/WO US0151437)

Priority Application: US 2000694050 20001020

Parent Application/Grant:

Related by Continuation to: US 2000694050 20001020 (CIP)

Designated States: AE AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CO CR CU

CZ DE DK DM DZ EC EE ES FI GB GD GE GH GM HR HU ID IL IN IS JP KE KG KP

KR KZ LC LK LR LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PH PL PT RO RU

SD SE SG SI SK SL TJ TM TR TT TZ UA UG US UZ VN YU ZA ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GQ GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 243912

**7/3,K/3      (Item 3 from file: 349)**

DIALOG(R)File 349:PCT FULLTEXT

(c) 2003 WIPO/Univentio. All rts. reserv.

00826098      \*\*Image available\*\*

**A NETWORK-BASED SYSTEM**

**SYSTEME BASE SUR UN RESEAU**

Patent Applicant/Assignee:

INTERNET PAYMENTS PATENTS LIMITED, "Elsinore", Meath Road, Bray, County  
Wicklow, IE, IE (Residence), IE (Nationality), (For all designated  
states except: US)

Patent Applicant/Inventor:

FORAN John Anthony, "Elsinore", Meath Road, Bray, County Wicklow, IE, IE  
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CORCORAN Joseph Patrick, 9 Carysfort Grove, Blackrock, County Dublin, IE,  
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Legal Representative:



O'CONNOR Donal H (et al) (agent), Cruickshank & Co., 1 Holles Street,  
Dublin 2, IE,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200159635 A1 20010816 (WO 0159635)

Application: WO 2001IE22 20010212 (PCT/WO IE0100022)

Priority Application: IE 2000121 20000211

Designated States: AE AL AM AT AU AZ BA BB BG BR BY CA CH CN CR CU CZ DE DE  
(utility model) DK DK (utility model) DM EE ES FI GB GD GE GH GM HR HU ID  
IL IN IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MA MD MG MK MN MW MX NO  
NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT TZ UA UG US UZ VN YU ZA ZW  
(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR  
(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG  
(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW  
(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 12001

Fulltext Availability:

Detailed Description

Claims

Detailed Description

... merchant computer sends with the merchant transaction identifier  
number, product identification sufficient to determine the **tax** due;  
the **taxation** due is **calculated** ;  
0  
the **taxation** due is added to the amount of the payment request as a  
consolidated payment request in the customer computer;  
sending of the transaction acceptance message to the **customer accounts**

5 server, the **customer accounts** server sends instructions to the  
system

services server to cause payment to the government body...

Claim

... computer sends with the merchant transaction  
identifier number, product identification sufficient to determine the  
- 36  
**tax** due;  
the **taxation** due is **calculated** ;  
s the **taxation** due is added to the amount of the payment request as  
a consolidated payment request in the customer computer;  
sending of the transaction acceptance message to the **customer**  
**accounts** server, the **customer accounts** server sends instructions to  
the system services server to cause payment to the government  
body...

7/3,K/4 (Item 4 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00806389

**SCHEDULING AND PLANNING BEFORE AND PROACTIVE MANAGEMENT DURING MAINTENANCE  
AND SERVICE IN A NETWORK-BASED SUPPLY CHAIN ENVIRONMENT  
PROGRAMMATION ET PLANIFICATION ANTICIPEE, ET GESTION PROACTIVE AU COURS DE  
LA MAINTENANCE ET DE L'ENTRETIEN D'UN ENVIRONNEMENT DU TYPE CHAINE  
D'APPROVISIONNEMENT RESEAUTEE**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

MIKURAK Michael G, 108 Englewood Boulevard, Hamilton, NJ 08610, US,

Legal Representative:

HICKMAN Paul L (agent), Oppenheimer Wolff & Donnelly, LLP, 38th Floor,  
 2029 Century Park East, Los Angeles, CA 90067-3024, US,  
 Patent and Priority Information (Country, Number, Date):  
 Patent: WO 200139082 A2 20010531 (WO 0139082)  
 Application: WO 2000US32228 20001122 (PCT/WO US0032228)  
 Priority Application: US 99447625 19991122; US 99444889 19991122  
 Designated States: AL AM AT AU AZ BA BB BG BR BY CA CH CN CU CZ DE DK EE ES  
 FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT LU LV MD  
 MG MK MN MW MX NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR TT UA UG UZ  
 VN YU ZW  
 (EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR  
 (OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG  
 (AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW  
 (EA) AM AZ BY KG KZ MD RU TJ TM  
 Publication Language: English  
 Filing Language: English  
 Fulltext Word Count: 152479

Fulltext Availability:  
 Claims

#### Claim

... the negotiated 2412  
 discounts, and the rebates, the  
 billing data being suitable for  
 generating a **customer invoice**  
 EW  
 Figure 24  
 INPUTS 1504 OUTPUTS  
 Payments  
 i us mer Invoices us mer  
 1500 1500...

...delete Create and distribute invoices  
 Order customer acct Collect payments Other provid  
 Handling Establish > Handle **customer account** Treasury  
 desired bill date inquiries Accounts and other  
 1506 Activate billing Debl: Management payable, Financia...

...of olhor providers  
 receivable Functions  
 t er provider  
 (not covered)  
 Rating/  
 Discounting  
 Figure 25  
 Receiving **customer account**  
 inquiries and customer payment  
 information  
 Collecting billing data, the billing 2602  
 data including discounts due...

...of service violations, and  
 rebates due to service leve(inverted exclamation mark)  
 agreement violations  
 Creating **customer account** 2604  
 invoices for distribution, wherein  
 the **customer account** invoices are  
 based on the customer payment  
 information and the billing data  
 Figure 26  
 Provide...1 . 5414  
 PROCESSING AN ORDER FOR AT LEAST ONE OF THE PRODUCTS AND SERVICES-.,@  
 1  
**CALCULATING** AT LEAST ONE OF A **TAX** AND A SHIPPING FEE FOR AT LEAST ONE

THE PRODUCTS AND SERVICES FOR WHICH THE...

7/3,K/5 (Item 5 from file: 349)  
DIALOG(R)File 349:PCT FULLTEXT  
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00806384

**NETWORK AND LIFE CYCLE ASSET MANAGEMENT IN AN E-COMMERCE ENVIRONMENT AND  
METHOD THEREOF**

**GESTION D'ACTIFS DURANT LE CYCLE DE VIE ET EN RESEAU DANS UN ENVIRONNEMENT  
DE COMMERCE ELECTRONIQUE ET PROCEDE ASSOCIE**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

MIKURAK Michael G, 108 Englewood Blvd., Hamilton, NJ 08610, US,

Legal Representative:

HICKMAN Paul L (agent), Oppenheimer Wolff & Donnelly, LLP, 38th Floor,  
2029 Century Park East, Los Angeles, CA 90067-3024, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200139030 A2 20010531 (WO 0139030)

Application: WO 2000US32324 20001122 (PCT/WO US0032324)

Priority Application: US 99444775 19991122; US 99447621 19991122

Designated States: AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CU CZ DE DK

DZ EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR LS LT

LU LV MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK SL TJ TM TR

TT UA UG UZ VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 171499

Fulltext Availability:

Claims

Claim

... information, the negotiated  
discounts, and the rebates, the  
billing data being suitable for  
generating a **customer invoice**

Figure 24

24/129

INPUTS 1504 OUTPUTS

Payments

Invoices

us omer Custornor

1500 1500

ustomer...

...Resolution

Manage

Create, delete Create and distribute invoices

customer acct Collect payments Other provide

Handle **customer account**

Establish Treasury

desired bill date inquiries Accounts and other

Debt Management payable, Financial

1506 Activate...

...on behalf of other providers receivable Functions

(not covered)

records  
Figure 25  
25/129  
Receiving **customer account**  
inquiries and customer payment  
information  
Collecting billing data, the billing 2602  
data including discounts due to  
quality of service violations, and  
rebates due to service level  
agreement violations  
Creating **customer account** 2604  
invoices for distribution, wherein  
the **customer account** invoices are  
based on the customer payment  
information and the billing data  
1111 1@ I...PROCESSING AN ORDER FOR AT LEAST ONE OF THE PRODUCTS AND  
SERVICES  
55,4 16  
**CALCULATING** AT LEAST ONE OF A **TAX** AND A SHIPPING FEE FOR AT LEAST ONE  
THE PRODUCTS AND SERVICES FOR WHICH THE...

7/3,K/6 (Item 6 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00806383

**COLLABORATIVE CAPACITY PLANNING AND REVERSE INVENTORY MANAGEMENT DURING  
DEMAND AND SUPPLY PLANNING IN A NETWORK-BASED SUPPLY CHAIN ENVIRONMENT  
AND METHOD THEREOF**

**PLANIFICATION EN COLLABORATION DES CAPACITES ET GESTION ANTICIPEE DES  
STOCKS LORS DE LA PLANIFICATION DE L'OFFRE ET DE LA DEMANDE DANS UN  
ENVIRONNEMENT DE CHAINE D'APPROVISIONNEMENT FONDEE SUR LE RESEAU ET  
PROCEDE ASSOCIE**

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
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Inventor(s):

MIKURAK Michael G, 108 Englewood Blvd., Hamilton, NJ 08610, US,

Legal Representative:

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Road, Palo Alto, CA 94304, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200139029 A2 20010531 (WO 0139029)

Application: WO 2000US32309 20001122 (PCT/WO US0032309)

Priority Application: US 99444655 19991122; US 99444886 19991122

Designated States: AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CR CU CZ DE

DK DM DZ EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK LR

LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK SL

TJ TM TR TT TZ UA UG UZ VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 157840

Fulltext Availability:

Detailed Description

Claims

Detailed Description

... network for some definite period of time. Usually, the user must keep

track of the **account** identifier in order that the prior session  
information can be retrieved.

151

It is desirable...

#### Claim

... information, the negotiated  
discounts, and the rebates, the  
billing data being suitable for  
generating a **customer invoice**  
EMSEMBURINKIEEMMM

Figure 24

24/130

INPUTS 1504 OUTPUTS

us mer Payments Invoices

Customer

1500 1500...

...nvoicinglCollections Resolution Management  
Create, delete Create and distribute invoices  
customer acct Collect payments  
Establish Handle **customer account** Treasury  
desired bill date inquiries Accounts and other  
-- -' - 11@

Debt Management

1506 Activate billing payable...

...on behalf of other providers jrpeceivable Functions  
(not covered)

records

Figure 25

25/130

Receiving **customer account**  
inquiries and customer payment  
information

IF

Collecting billing data, the billing 26 0-22  
data...

...of service violations, and  
rebates due to service level  
agreement violations

I F

2604

Creating **customer account**  
invoices for distribution, wherein  
the **customer account** invoices are  
based on the customer payment  
information and the billing data

Figure 26

26...SERVICES

4

PROCESSING AN ORDER FOR AT LEAST ONE OF THE PRODUCTS AND SERVICES

9A46

**CALCULATING** AT LEAST ONE OF A **TAX** AND A SHIPPING FEE FOR AT LEAST ONE  
OE  
THE PRODUCTS AND SERVICES FOR WHICH...

7/3,K/7 (Item 7 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00806382

METHOD FOR AFFORDING A MARKET SPACE INTERFACE BETWEEN A PLURALITY OF

MANUFACTURERS AND SERVICE PROVIDERS AND INSTALLATION MANAGEMENT VIA A  
MARKET SPACE INTERFACE

PROCEDE DE MISE A DISPOSITION D'UNE INTERFACE D'ESPACE DE MARCHÉ ENTRE UNE  
PLURALITE DE FABRICANTS ET DES FOURNISSEURS DE SERVICES ET GESTION  
D'UNE INSTALLATION VIA UNE INTERFACE D'ESPACE DE MARCHÉ

Patent Applicant/Assignee:

ACCENTURE LLP, 1661 Page Mill Road, Palo Alto, CA 94304, US, US  
(Residence), US (Nationality)

Inventor(s):

MIKURAK Michael G, 108 Englewood Blvd., Hamilton, NJ 08610, US,

Legal Representative:

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Page Mill Road, Palo Alto, CA 94304, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200139028 A2 20010531 (WO 0139028)

Application: WO 2000US32308 20001122 (PCT/WO US0032308)

Priority Application: US 99444773 19991122; US 99444798 19991122

Designated States: AE AG AL AM AT AU AZ BA BB BG BR BY BZ CA CH CN CR CU CZ

DE DK DM DZ EE ES FI GB GE GH GM HR HU ID IL IS JP KE KG KP KR KZ LC LK

LR LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI SK

SL TJ TM TR TT TZ UA UG UZ VN YU ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE TR

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English

Filing Language: English

Fulltext Word Count: 170977

Fulltext Availability:

Detailed Description

Claims

Detailed Description

... an order for the products and services may be received and processed,  
after which a **tax** and a shipping fee are **calculated**. A status of  
delivery for one or more of the ordered products and services may...

...configuration. The advertising could include customized advertising  
based upon the user profile. The step of **calculating** at least one of  
the **tax** and the shipping fee may further include calculating a  
plurality of taxes and shipping fees...be purchased in the supermarket  
are once put into a shopping basket and lastly the **account** is settled  
at a counter. In this manner, by preparing the purchase list to order...  
business rules defined by the seller, e.g., what credit cards are  
accepted and what **customer** information is tracked during each sale.

Some

156

of these servers are connected to external...

Claim

... the negotiated 2412

discounts, and the rebates, the  
.billing data being suitable for  
generating a **customer invoice**

Figure 24

INPUTS 1504 OUTPUTS

Payments Invoices

Customer

1500 1500

Customer

Interface Inquiries r IF...

...ent

Create, delete Create and distribute invoices

customer acct Collect payments Other provide  
lb Handle **customer account**  
Establish Treasury  
inquiries A nts  
u and other  
ou  
desired bill date 'o  
2c  
'c...

...eivaUle

Bill on behalf of other providers receivable Functions  
(not covered)

records

Figure 25

Receiving **customer account**

inquiries and customer payment  
information

Collecting billing data, the billing 2602

data including discounts due to

quality of service violations, and

rebates due to service level

agreement violations

Creating **customer account** 2604

invoices for distribution, wherein

the **customer account** invoices are

based on the customer payment

information and the billing data

M,

Figure 26...AND SERVICES

...-.- ..... 5414

PROCESSING AN ORDER FOR AT LEAST ONE OF THE PRODUCTS AND SERVICES

**CALCULATING** AT LEAST ONE OF A **TAX** AND A SHIPPING FEE FOR AT LEAST ONE  
OF,

THE PRODUCTS AND SERVICES FOR WHICH...

7/3,K/8 (Item 8 from file: 349)

DIALOG(R)File 349:PCT FULLTEXT

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00769406 \*\*Image available\*\*

**INTEGRATED BUSINESS-TO-BUSINESS WEB COMMERCE AND BUSINESS AUTOMATION SYSTEM**  
**SYSTEME INTEGRE D'AUTOMATISATION DES ECHANGES COMMERCIAUX ENTRE ENTREPRISES**  
**PAR L'INTERNET**

Patent Applicant/Inventor:

WONG Charles, 14250 Miranda Road, Los Altos Hills, CA 94022, US, US

(Residence), US (Nationality)

Legal Representative:

COVERSTONE Thomas E (agent), Burns, Doane, Swecker & Mathis, LLP, P.O.

Box 1404, Alexandria, VA 22313-1404, US,

Patent and Priority Information (Country, Number, Date):

Patent: WO 200102927 A2-A3 20010111 (WO 0102927)

Application: WO 2000US16739 20000616 (PCT/WO US0016739)

Priority Application: US 99334688 19990617

Parent Application/Grant:

Related by Continuation to: US 99334688 19990617 (CON)

Designated States: AE AG AL AM AT AU AZ BA BB BG BR BY CA CH CN CR CU CZ DE

DK DM DZ EE ES FI GB GD GE GH GM HR HU ID IL IN IS JP KE KG KP KR KZ LC

LK LR LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PL PT RO RU SD SE SG SI

SK SL TJ TM TR TT TZ UA UG US UZ VN YU ZA ZW

(EP) AT BE CH CY DE DK ES FI FR GB GR IE IT LU MC NL PT SE

(OA) BF BJ CF CG CI CM GA GN GW ML MR NE SN TD TG

(AP) GH GM KE LS MW MZ SD SL SZ TZ UG ZW

(EA) AM AZ BY KG KZ MD RU TJ TM

Publication Language: English  
Filing Language: English  
Fulltext Word Count: 51133

Fulltext Availability:  
Claims

#### Claim

... of RMAs, for example, the related switch capability may be used to switch to related **customer invoices**, vendor invoices, credit memos, etc. One file may be related to another file but only...has not been received. To cite further examples, in the case of vendor invoices and **customer invoices**, described hereinafter, the user may easily, with a click of a button, mark a vendor invoice for approval or cause an aging report window to be displayed for **customer invoices**. The knowledge base and the application of it to data input and user actions  
60...

...or final quarterly payment) for the appropriate period. As shown in Figure 82, the sales **tax** module automatically **calculates** the figures to be entered on each line of a sales tax return, or may...

...each order will typically have two commissions. Commission records are created at the time a **customer invoice** is issued. Commissions are then approved and scheduled to a commission register for payment in...

...of commissions may be greater than two.

#### Accounts Receivable

When an order is shipped, a **customer invoice** is automatically issued, i.e., entered into the computer system. If paper invoices are required...

...regular intervals (each day, for example) an accounts payable clerk prints out, checks and mails **customer invoices** issued during the preceding interval. (Alternatively, the printing and mailing of **customer invoices** may also be automated.) In an exemplary embodiment, invoices are issued using the "Issue invoices" option within the **customer invoice** file. A **customer invoice** screen display is shown in Figure 83. With the passage of time from the invoice...software, running on separate PC servers, are provided for different business segments (e.g., different **customers**, **accounts**, groups of customers). These PC servers are shown within a server block. Business scalability is...or all of the following business processes: P/O conversion, PSRI, price/product, vendor invoice **verification**, G/L and accounting, sales **tax** /recurring process, reports for customers, and reports for partners. The consolidated process cluster may also...

...to information relating to a specific business function, e.g., G/L, financial statements, sales **tax**, purchase orders, vendor invoice **verification**, vendor payment, reports, etc. In this manner, business information is channeled in a highly structured...

?



File 16:Gale Group PROMT(R) 1990-2003/Jun 13  
 (c) 2003 The Gale Group  
 File 148:Gale Group Trade & Industry DB 1976-2003/Jun 12  
 (c)2003 The Gale Group  
 File 160:Gale Group PROMT(R) 1972-1989  
 (c) 1999 The Gale Group  
 File 275:Gale Group Computer DB(TM) 1983-2003/Jun 13  
 (c) 2003 The Gale Group  
 File 621:Gale Group New Prod.Annou.(R) 1985-2003/Jun 12  
 (c) 2003 The Gale Group  
 File 636:Gale Group Newsletter DB(TM) 1987-2003/Jun 11  
 (c) 2003 The Gale Group

?ds

Set	Items	Description
S1	46052	(CUSTOMER? OR CLIENT?) ( ) (BILL? ? OR INVOICE? OR ACCOUNT OR ACCOUNTS OR BILLING? OR CHARGE? ?) OR HOLD()BILL?
S2	8585940	(ELECTRONIC OR AUTOMAT? OR DIGIT? OR COMPUTER? OR MECHANIZ? OR MECHANIS?)
S3	11391	S2(3N) (SPREADSHEET? OR LEDGER? OR WORKSHEET? OR (SPREAD OR WORK) ( ) SHEET?)
S4	40636	(CALCULAT? OR VERIF? OR COMPAR?) (5N) (TAX? ? OR TAXATION?)
S5	21	S1(S)S3
S6	0	S5(S) (TAXE? ? OR TAXATION?)
S7	14	S5 NOT PY>2001
S8	13	RD (unique items)
S9	440	S1(S) (SPREADSHEET? OR LEDGER? OR WORKSHEET? OR (SPREAD OR - WORK) ( ) SHEET?)
S10	2	S9(S)S4
S11	2	S10 NOT S8
S12	2	RD (unique items)

8/3,K/1 (Item 1 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
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01271509 Supplier Number: 41481752 (USE FORMAT 7 FOR FULLTEXT)

**PLAYING FOR KEEPS**

ADWEEK Eastern Edition, v0, n0, p24

August 6, 1990

Language: English Record Type: Fulltext Abstract

Document Type: Magazine/Journal; Trade

Word Count: 2201

**ABSTRACT:**

...agencies, remain the most popular functions. Word processing is No. 1: 100% of agencies with **computers** do it. **Spreadsheets**, revenue/income analysis, **customer billing** and client record keeping follow, with 89% to 94% each.

Media buying (69% of agencies...

... agencies, remain the most popular functions. Word processing is No. 1: 100% of agencies with **computers** do it. **Spreadsheets**, revenue/income analysis, **customer billing** and client record keeping follow, with 89% to 94% each.

Media buying (69% of agencies...

8/3,K/2 (Item 1 from file: 148)

DIALOG(R)File 148:Gale Group Trade & Industry DB

(c)2003 The Gale Group. All rts. reserv.

06381527 SUPPLIER NUMBER: 13116833 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**MOST COMPANIES NEED COMPUTER-LITERATE EMPLOYEES, BUT TRAINING AND TESTING FOR COMPUTER SKILLS LAG**

PR Newswire, 0218NY024

Feb 18, 1993

LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT

WORD COUNT: 656 LINE COUNT: 00061

... North America, which employ 390,000 assignment employees and caregivers serving more than 185,000 **client accounts**. Founded in 1950, the company is headquartered in Westbury, N.Y. Olsten serves the computer ...

...hands-on, PC-based system for evaluation, training, and on-the-job support for office **automation** and **spreadsheets**. The Precise system evaluations are the only evaluations of its kind validated by the Educational...

8/3,K/3 (Item 2 from file: 148)

DIALOG(R)File 148:Gale Group Trade & Industry DB

(c)2003 The Gale Group. All rts. reserv.

04811444 SUPPLIER NUMBER: 08821538 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Playing for keeps. (Computers in Advertising)**

Berry, Jon

Adweek's Marketing Week, v31, n32, p24(4)

August 6, 1990

ISSN: 0892-8274 LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT

WORD COUNT: 2297 LINE COUNT: 00179

... agencies, remain the most popular functions. Word processing is No. 1: 100% of agencies with **computers** do it. **Spreadsheets**, revenue/income analysis, **customer billing** and client record keeping follow, with 89% to 94% each.

Media buying (69% of agencies...

8/3,K/4 (Item 3 from file: 148)

DIALOG(R)File 148:Gale Group Trade & Industry DB

(c)2003 The Gale Group. All rts. reserv.

04801119 SUPPLIER NUMBER: 09283687 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Playing for keeps. (Special Report: Computers in Advertising)**

Berry, Jon

ADWEEK Western Advertising News, v40, n32, p24(4)

August 6, 1990

ISSN: 0199-4743 LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT

WORD COUNT: 2289 LINE COUNT: 00178

... agencies, remain the most popular functions. Word processing is No. 1: 100% of agencies with **computers** do it. **Spreadsheets**, revenue/income analysis, **customer billing** and client record keeping follow with 89% to 94% each.

Media buying (69% of agencies...

8/3,K/5 (Item 4 from file: 148)

DIALOG(R)File 148:Gale Group Trade & Industry DB

(c)2003 The Gale Group. All rts. reserv.

04500908 SUPPLIER NUMBER: 08049130 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Third annual 1990 directory of human resources services, products and suppliers. (directory)**

Personnel, v67, n1, p41(109)

Jan, 1990

DOCUMENT TYPE: directory ISSN: 0031-5702 LANGUAGE: ENGLISH

RECORD TYPE: FULLTEXT; ABSTRACT

WORD COUNT: 105313 LINE COUNT: 10071

... Roche Associates, Inc. is a human resources consulting firm located in Levittown, N.Y. with **clients** in six states. Its expertise covers all of the functional areas of Human Resource Management...keyboard including typing speed, spelling, editing, and software proficiency on all popular word processors and **spreadsheets**. Tests are **automatically** administered and scored. Incredibly easy to use on your IBM PC or compatible. \$25 dollar...

8/3,K/6 (Item 5 from file: 148)

DIALOG(R)File 148:Gale Group Trade & Industry DB

(c)2003 The Gale Group. All rts. reserv.

03002293 SUPPLIER NUMBER: 04522149 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Quotron Systems International Inc. introduces its newest and most advanced system, Quotron 1000.**

PR Newswire, LA3

Nov 17, 1986

LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT

WORD COUNT: 493 LINE COUNT: 00041

... data from around the world and provides access to a multitude of data sources, including **customer account** files and technical and fundamental databases. Services available on the system include real-time analytics...

...entry facility, applications for evaluating portfolio performance, and office automation applications such as word processing, **spreadsheet** and

**electronic mail.**

The Quotron 1000, based on the Unix operating system and the programming language C...

**8/3,K/7 (Item 6 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2003 The Gale Group. All rts. reserv.

02199519 SUPPLIER NUMBER: 03429309 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Quotron Systems Inc. expects '84 revenue increase.**

PR Newswire, NYPR24

Sept 12, 1984

LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT

WORD COUNT: 560 LINE COUNT: 00045

... complete list of services being delivered on the QUOTRON 1000 including quotations, options, news recall, **customer account** retrieval, third party data bases, an **electronic spread sheet** for personal computing and business graphics.

George H. Levine, vice president-marketing, said, "The utility...

**8/3,K/8 (Item 7 from file: 148)**

DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2003 The Gale Group. All rts. reserv.

02194065 SUPPLIER NUMBER: 03359621 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Quotron Systems Inc. reports second-quarter and six-month results.**

PR Newswire, LA2

July 23, 1984

LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT

WORD COUNT: 664 LINE COUNT: 00069

... software.

"The initial systems release offers such present FIS services as quotations, monitoring, options, news, **customer account** retrieval and others, plus an advanced word processing system, **electronic spreadsheet**, document manager, **electronic mail**, business graphics and a broker portfolio system.

"Reactions from customers to the Q1000 have...

**8/3,K/9 (Item 1 from file: 160)**

DIALOG(R)File 160:Gale Group PROMT(R)  
(c) 1999 The Gale Group. All rts. reserv.

02075298

**NORTH EDGE SOFTWARE ANNOUNCES TAL (TM) -- TIMESLIPS (R) III ACCOUNTING LINK**  
News Release October 27, 1988 p. 1

... on that ports TIMESLIPS (R) III time and billing software data directly into the general **ledgers** of **COMPUTER ASSOCIATES**, GREAT PLAINS, DAC-EASY, PEACHTREE, CHAMPION, COUGAR MOUNTAIN, MANUSOFT, and JAMES RIVER GROUP accounting...

... III is also made to the user's accounting system automatically; a debit to a **client account** is automatically credited to the user's general ledger. TIMESLIPS III offers time and expense...

**8/3,K/10 (Item 2 from file: 160)**

DIALOG(R)File 160:Gale Group PROMT(R)  
(c) 1999 The Gale Group. All rts. reserv.

01062826

**Computers and Meetings Help One Company Face the Future.**

Waste Age June, 1984 p. 34-391

... 2 printers simultaneously, and has 40 Mbytes of hard disc memory. The computer breaks out **customer bill** charges, analyzes business changes on an **electronic spreadsheet**, analyzes operations information, and will be used to store and generate preventive maintenance data. The...

**8/3,K/11 (Item 1 from file: 275)**

DIALOG(R)File 275:Gale Group Computer DB(TM)

(c) 2003 The Gale Group. All rts. reserv.

01117807 SUPPLIER NUMBER: 00625002

**How to Track Aging Accounts.**

Alexander, P.

Business Computing, v3, n1, p63-64

Jan., 1985

ISSN: 0741-4641 LANGUAGE: ENGLISH RECORD TYPE: ABSTRACT

ABSTRACT: Every month, **customer account** records must be prepared showing all transaction information for each customer. This process can be easily **automated** using a simple **spreadsheet** package, like VisiCalc, and date arithmetic. Elapsed time since the invoice was sent out is...

**8/3,K/12 (Item 1 from file: 636)**

DIALOG(R)File 636:Gale Group Newsletter DB(TM)

(c) 2003 The Gale Group. All rts. reserv.

04591487 Supplier Number: 59600027 (USE FORMAT 7 FOR FULLTEXT)

**BROKERS AUTOMATE AT JAMAICA EXCHANGE.**

Operations Management, v6, n6, p7

Feb 7, 2000

Language: English Record Type: Fulltext

Document Type: Newsletter; Trade

Word Count: 216

(USE FORMAT 7 FOR FULLTEXT)

**TEXT:**

...expects each of its six broker/dealer participants to be accessing the exchange's general **ledger automatically** by next Monday. To accomplish this, the exchange participants are now automating their own back offices for **client account** functions for securities and cash, explained Wayne Iton, general manager at the JSE. After all...

**8/3,K/13 (Item 2 from file: 636)**

DIALOG(R)File 636:Gale Group Newsletter DB(TM)

(c) 2003 The Gale Group. All rts. reserv.

02054263 Supplier Number: 43750367 (USE FORMAT 7 FOR FULLTEXT)

**COMPUTER TRAINING AND TESTING LAG**

Mainframe Computing, v6, n4, pN/A

April, 1993

Language: English Record Type: Fulltext

Document Type: Newsletter; Trade

Word Count: 558

... North America, which employ 390,000 assignment employees and caregivers serving more than 185,000 **client accounts**. Founded in 1950, the company is headquartered in Westbury, NY. Olsten serves the computer staffing...

...hands-on, PC-based system for evaluation, training, and on-the-job support for office **automation** and **spreadsheets** . The Precise system evaluations are the only evaluations of its kind validated by the Educational...

12/3,K/1 (Item 1 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)2003 The Gale Group. All rts. reserv.

14913143 SUPPLIER NUMBER: 90819835 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Leading low-end accounting software.**  
Basile, Anthony; Papa, Louis J.; Johnston, Randy  
CPA Journal, 72, 8, 40(8)  
August, 2002  
ISSN: 0732-8435 LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 5099 LINE COUNT: 00475

... orders; allows quotes to be converted into sales orders or  
invoices; supports credit card sales; **calculates** sales **tax** and freight  
automatically; creates customer terms and discounts automatically; tracks  
**customer accounts** ; and generates customer statements with interest. Its  
purchases and payments feature processes invoices, prints purchase...

12/3,K/2 (Item 1 from file: 275)  
DIALOG(R)File 275:Gale Group Computer DB(TM)  
(c) 2003 The Gale Group. All rts. reserv.

01056364 SUPPLIER NUMBER: 00568899  
**Business Productivity Tools.**  
Byte, v9, n8, p436  
Aug., 1984  
DOCUMENT TYPE: product announcement ISSN: 0360-5280 LANGUAGE:  
ENGLISH RECORD TYPE: ABSTRACT

...ABSTRACT: financial management series for the IBM PCjr is composed of  
modules which consist of a **ledger** , receivables, sales, and payables. All  
modules are 32K, reside on a single disk and include templates and workbook  
manuals. The receivables module shows the status of **customer accounts** ,  
audit accounts, and produces reports; the payable module tracks payments  
for vendors including terms, discounts and outstanding balances. The sales  
module has automatic **tax calculation** , and its journal provides a trial  
audit. The general **ledger** constantly displays income, expenses, assets,  
liabilities, estimated profits, and net worth. The modules are priced...

File 2:INSPEC 1969-2003/Jun W1  
 (c) 2003 Institution of Electrical Engineers  
 File 35:Dissertation Abs Online 1861-2003/May  
 (c) 2003 ProQuest Info&Learning  
 File 65:Inside Conferences 1993-2003/Jun W2  
 (c) 2003 BLDSC all rts. reserv.  
 File 99:Wilson Appl. Sci & Tech Abs 1983-2003/Apr  
 (c) 2003 The HW Wilson Co.  
 File 233:Internet & Personal Comp. Abs. 1981-2003/May  
 (c) 2003 Info. Today Inc.  
 File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13  
 (c) 2002 The Gale Group  
 File 474:New York Times Abs 1969-2003/Jun 12  
 (c) 2003 The New York Times  
 File 475:Wall Street Journal Abs 1973-2003/Jun 12  
 (c) 2003 The New York Times

?ds

Set	Items	Description
S1	1405	(CUSTOMER? OR CLIENT?) ( ) (BILL? ? OR INVOICE? OR ACCOUNT OR ACCOUNTS OR BILLING? OR CHARGE? ?) OR HOLD()BILL?
S2	3157025	(ELECTRONIC OR AUTOMAT? OR DIGIT? OR COMPUTER? OR MECHANIZ? OR MECHANIS?)
S3	2442	S2(3N)(SPREADSHEET? OR LEDGER? OR WORKSHEET? OR (SPREAD OR WORK) ( )SHEET?)
S4	3771	(CALCULAT? OR VERIF? OR COMPAR?) (5N) (TAX? ? OR TAXATION?)
S5	4	S1 AND S3
S6	4	RD (unique items)
S7	2	S1 AND /S4
S8	2	S7 NOT S6
S9	2	RD (unique items)
?		



6/5/1 (Item 1 from file: 2)  
DIALOG(R)File 2:INSPEC  
(c) 2003 Institution of Electrical Engineers. All rts. reserv.

02521951 INSPEC Abstract Number: D85002625

**Title: A fast way to deal with fares (computerised system)**

Journal: Computer Systems vol.5, no.8 p.10

Publication Date: Aug. 1985 Country of Publication: UK

CODEN: COSYEG ISSN: 0264-4193

Language: English Document Type: Journal Paper (JP)

Treatment: General, Review (G); Practical (P)

Abstract: If you are a taxi driver, you collect the fare shown on the meter at the end of the journey, and that's that. As long as the day's takings correspond with the metered journeys, your accounts are as good as agreed. Not so if you are in the contract hire business, where 99% of your journeys are for account customers, and where each journey has to be painstakingly logged and the fare calculated to be invoiced at the end of the month. West One is an example of such a hire company. With a turnover approaching Pounds 5m, it has about 2000 account customers and carries out over 2000 journeys each day. Including weekend work this can mean up to 60000 trips per month to be noted, logged, calculated, collated and provided as accompanying documentation with **customers' accounts**. The company has installed a computerised system with an Accron microcomputer from Newtons Laboratories, a 30 Mbyte Winchester hard disk, a printer and two terminals. Software for the system includes Omicron's PowerSales and Power-Ledger with a program specially written for the 'docket-processing' which would interface with Power-Sales. The **ledger** packages themselves would **automatically** integrate with each other. Future software developments will include automatic fare pricing. (0 Refs)

Subfile: D

Descriptors: travel industry

Identifiers: docket processing; taxi driver; metered journeys; contract hire business; West One; **customers' accounts**; computerised system; Accron microcomputer; Newtons Laboratories; 30 Mbyte Winchester hard disk; printer; terminals; Omicron's PowerSales; Power-Ledger; automatic fare pricing

Class Codes: D2090 (Leisure industry, travel and transport)

6/5/2 (Item 1 from file: 233)  
DIALOG(R)File 233:Internet & Personal Comp. Abs.  
(c) 2003 Info. Today Inc. All rts. reserv.

00525429 99PW02-001

**QuickBooks gets the Office connection**

Arar, Yarden

PC World, February 1, 1999, v17 n2 p80-81, 2 Page(s)

ISSN: 0737-8939

Company Name: Intuit

URL: <http://www.quickbooks.com>

Product Name: QuickBooks Pro 99

Languages: English

Document Type: Software Review

Grade (of Product Reviewed): B

Hardware/Software Compatibility: IBM PC Compatible

Geographic Location: United States

Presents a favorable review of QuickBooks Pro 99 (\$219, street, single-user; \$599, five-user pack), an upgrade to the small business accounting solution from Intuit (800). Features integration with Office 97, including automated letter-writing based on customer financial data, and Excel spreadsheet integration. Also features a built-in stopwatch for users who bill by the hour. Includes functions for filling out bank deposit slips, tracking cash, and attaching purchase orders to **customer accounts**. Notes that this version is a good option for those users who did not recently upgrade to Version 6.0. However, complains that for those who ha

recently upgraded, it may be a bit pricey, despite the extra rebates. Concludes that this is a good upgrade for current QuickBooks users. Includes one screen display, one photo, and one product summary. (kgh)

Descriptors: Accounting; Small Business; Office **Automation** ;  
**Spreadsheet** ; Word Processing; Finances  
Identifiers: QuickBooks Pro 99; Intuit

6/5/3 (Item 2 from file: 233)

DIALOG(R)File 233:Internet & Personal Comp. Abs.

(c) 2003 Info. Today Inc. All rts. reserv.

00110612 85PO07-024

**Back to Basics accounting: Peachtree's accrual system is a real asset for small businesses**

Keller, Karl

Popular Computing , Jul 1985 , v4 n9 p106-110, 3 Pages

ISSN: 0279-4721

Languages: English

Document Type: Software Review

Geographic Location: United States

A very favorable review of Back to Basics, accounting software that costs \$395 for IBM PCs and compatibles and the Macintosh, and \$195 for Ataris, Apples and the Commodore 64 from Management Science America Inc. Says that this "menu-driven program can maintain detailed financial records, keep day-to-day track of a company's performance, forecast cash needs" and "monitor **customers ' accounts**". Suggests that it is powerful and reasonably priced. Contains one illustration.

Descriptors: Accounting; Accounts Receivable; Accounts Payable; General **Ledger** ; IBM Personal **Computer** ; IBM PC Compatible; Atari; Apple II; Commodore 64; IBM PCjr; Macintosh; Software Review

Identifiers: Back to Basics; Management Science America Inc.; IBM Personal Computer; Macintosh; Commodore 64; Apple II; Atari; IBM PCjr

6/5/4 (Item 1 from file: 583)

DIALOG(R)File 583:Gale Group Globalbase(TM)

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02034144

REPORT SAYS GIROBANK SALE MAY BE PREMATURE

UK - REPORT SAYS GIROBANK SALE MAY BE PREMATURE

Independent (TI) 4 August 1988 p23

A confidential information memorandum on the Girobank sale issued by Schroders on behalf of the Post Office implies that the sale of Girobank is premature and will raise only GBP150-200 mil, less than would be possible if the bank were allowed to benefit from its modernisation programme over the next two years. The bank will have spent GBP22 mil on a **computerised customer account ledgering** and maintenance system, CALM, by the end of 1988, while it is estimated that a further GBP68 mil should be spent on computers over the next five years. Current profit is therefore affected by the cost of these programmes. The memorandum also shows that the client base of the bank has a larger proportion of the lower socio-economic classes and women than the other large clearing banks.

PRODUCT: Financial Services (6000);

EVENT: COMPANIES ACTIVITIES (10);

COUNTRY: United Kingdom (4UK); OECD Europe (415); NATO Countries (420);  
South East Asia Treaty Organisation (913);

9/5/1 (Item 1 from file: 233)  
DIALOG(R)File 233:Internet & Personal Comp. Abs.  
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00268383 92PI02-180

**RapidTax -- Tax software gets better with age**

Meadows, Laura Lou

PC Magazine , February 25, 1992 , v11 n4 p290, 298, 2 Page(s)

ISSN: 0888-8507

Company Name: DacEasy

Product Name: RapidTax

Languages: English

Document Type: Software Review

Grade (of Product Reviewed): c

Geographic Location: United States

Presents a mixed review of RapidTax (\$49.95), a tax preparation program from DacEasy Inc. of Dallas, TX (800). Runs on machines with 512MB of RAM, 4MB of hard drive space, and DOS 3.1 or later. Says RapidTax features mouse support, a wide range of forms and schedules, detailed worksheets, an Interview feature, a pop-up **calculator**, operational help screens, **tax** help windows, electronic filing, and **client billing**; but tax help is meager, and many two-keystroke commands are not onscreen. Also says the program d not do well in depreciation computation, underpayment penalty calculation, and passive losses. Includes a product summary, and a screen display. (tbc)

Descriptors: Taxes; Software Review

Identifiers: RapidTax; DacEasy

9/5/2 (Item 1 from file: 583)  
DIALOG(R)File 583:Gale Group Globalbase(TM)  
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09050221

London Scottish Bank's recovery slowed by costs

UK: LONDON SCOTTISH BANK HINDERED BY COSTS

Financial Times (FT) 27 Jan 1999 p.30

Language: ENGLISH

The consumer credit operations of London Scottish Banks, has seen only a slow recovery as buoyant debt collection revenues pushed pre-tax profits to GBt 10.6mn. An aborted takeover bid led to a charge of GBt 223,000, and a change in the way group **tax** is **calculated** meant that net profits were held back to GBt 7.04mn. Bad debts at the company fell off 11% to GBt 3.1mn and the loan business appears to be moving slowly forward. **Customer accounts** rose to 163,900 up by some 20,000. Isis, the newly acquired factoring business produced a profit of GBt 373,000, while Robinson Way, the debt collection agency saw **customer accounts** rise by 19%. This in turn helped lift operating income to GBt 9.87mn. Tax charges are set to rise from 26% to 28%. A tax charge of GBt 634,000 was made to settle an Inland Revenue claim from 1996. The company may embark upon another acquisition venture at a later stage, but it seems likely that any takeover would not be in the field of collected credit. Table: London Scottish Bank Figures in GBt mn Current Change Operating Income 9.87 13% Pre-tax Profits 10.6 12% Net Profits 7.04 0.7%

(c) Financial Times 1999

COMPANY: ROBINSON WAY; ISIS; LONDON SCOTTISH BANKS

PRODUCT: Retail Banking Services (6006); Clearing Banks (6010CB);  
Commercial Banks (6020);

EVENT: Financial Management (25); Company Reports & Accounts (83);

COUNTRY: United Kingdom (4UK);

File 15:ABI/Inform(R) 1971-2003/Jun 13  
     (c) 2003 ProQuest Info&Learning  
 File 75:TGG Management Contents(R) 86-2003/Jun W1  
     (c) 2003 The Gale Group  
 File 150:Gale Group Legal Res Index(TM) 1980-2003/Jun 13  
     (c)2003 The Gale Group  
 File 180:Federal Register 1985-2003/Jun 12  
     (c) 2003 format only The DIALOG Corp  
 File 485:Accounting & Tax DB 1971-2003/Jun W2  
     (c) 2003 ProQuest Info&Learning  
 File 605:U.S. Newswire 1999-2003/Jun 13  
     (c) 2003 U.S. Newswire via Comtex  
 File 660:Federal News Service 1991-2002/Jul 02  
     (c) 2002 Federal News Service  
 File 665:U.S. Newswire 1995-1999/Apr 29  
     (c) 1999 U.S. Newswire via Comtex

?ds

Set	Items	Description
S1	9427	(CUSTOMER? OR CLIENT?) () (BILL? ? OR INVOICE? OR ACCOUNT OR ACCOUNTS OR BILLING? OR CHARGE? ?) OR HOLD()BILL?
S2	1047133	(ELECTRONIC OR AUTOMAT? OR DIGIT? OR COMPUTER? OR MECHANIZ? OR MECHANIS?)
S3	4296	S2(3N) (SPREADSHEET? OR LEDGER? OR WORKSHEET? OR (SPREAD OR WORK) () SHEET?)
S4	19540	(CALCULAT? OR VERIF? OR COMPAR?) (5N) (TAX? ? OR TAXATION?)
S5	94	S1 AND S3
S6	20	S5 AND S4
S7	18	S6 NOT PY>2001
S8	13	RD (unique items)

8/3,K/1 (Item 1 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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01101174 97-50568

**Client write-up: Conquer the mountain**

Giovetti, Alfred C

Accounting Technology v11n9 PP: 20-51 Oct 1995

ISSN: 0883-1866 JRNL CODE: CIA

WORD COUNT: 13857

...TEXT: of an account balance or otherwise automatically calculated number. There are also no built-in **calculations** for income **tax** load, cost of goods sold, partnership allocations, asset depreciation, or amortization of loans. You can...Fixed amount, blank, override, or percent allocations make recurring entries easier. Recurring transactions include automatic **calculations** for income **tax** accrual, cost of goods sold, and FICA, Medicare, and net pay calculations that optionally post...claims are coming soon), no go-to function, no coordinate system for spreadsheets, and no **calculations** for **tax** accrual. The program can't change field order entry, nor can it custom generate account...directory. The program also supports monthly, weekly, quarterly, yearly, and 13 four-week accounting periods.

**Ledgermaster** uses a seven- **digit** account number scheme; a two-digit division code supports up to 99 divisions; a three...

... entry modes; automatic repeating entries; auto-reversing accruals; and prior-period adjustments to history files. **Ledgermaster** also supports **automatic** account posting, automatic offsetting debit or credit entries, special 1099 vendor reporting, and automatic check...

... and advances. It also skips unused withholding and deduction fields; tests FICA, Medicare, and SDI **calculations** ; and posts to federal income **tax** withholding. In addition, it **verifies** net payroll check amounts and calculates weeks worked for the state unemployment compensation report. Optional...

... forms and magnetic media modules are available. An extra-cost payroll check writer handles automatic **calculations** and 50-state **tax** reporting, with complete, editable tax tables.

Reconciliation/Reporting: A \$300 add-on bank reconciliation module... recurring entry that requires a different number and edit it individually. The program doesn't **calculate** income **tax** load, cost of goods sold, or other routine automatic items, except for partnership and corporate...

... journal supports up to 16 columns of information for splits and deductions. Payroll doesn't **calculate** federal or state income **tax** withholding and doesn't track payroll-based repayment of loan balances. The program does support...

... only two fonts. Up to 999 transmittal letters include 35 user-definable key codes for **client** , **account** , and accountant detail. The current version doesn't support last- ...a full audit trail of changes. You can edit or delete anything, perform batch posting, **calculate** income **tax** load, simultaneously display 15 transactions, perform cost of goods sold and net income distributions, as...

8/3,K/2 (Item 2 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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01095647 97-45041

**Financial software products**

Anonymous  
Management Accounting v77n3 PP: 103-112 Sep 1995  
ISSN: 0025-1690 JRNL CODE: NAA  
WORD COUNT: 8071

...TEXT: support. Features include real-time open order and A/R balances for credit availability and **automatic** cash application. General **ledger** interactively maintains financial records, permitting ready access to current financial information through flexible account structures...

... asset-related information, including tax category coding, depreciation start-date and on-off switch, and **tax calculation** results for quick-yet-powerful input and reference. Axtell runs on the popular Oracle relational... tables and graphics to build a custom executive information system in minutes. You can route **customer invoices** automatically to the credit manager via Microsoft Mail for approval. You can improve collections with...

8/3,K/3 (Item 3 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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00981237 96-30630  
**1040 tax prep update**  
Cohn, Michael  
Accounting Technology v11n2 PP: 18-23+ Feb 1995  
ISSN: 0883-1866 JRNL CODE: CIA  
WORD COUNT: 10122

...TEXT: a consumer tax program, now includes professional state software. "These have been enhanced to do **client billing** and client instruction letters for each state," says Accurso. "They also allow the preparer to... loss now carries automatically to line 13 of the 1040 from Schedule D or its **worksheet**. Moving expenses carry **automatically** from Form 3903 to line 24 on the 1040. The self-employed health insurance deduction...

... new BS/BAQ field where you can enter a military housing allowance; it will carry **automatically** to the EIC **worksheet**.

On Schedule A, a new field on line 7 lets you directly enter personal property...

...s a supporting statement for nontaxable use of undyed diesel fuel. Form 4137 (Social Security **Tax** on Unreported Tips) is now **calculated** to the income maximum, while Medicare **tax** is **calculated** on the entire sum of unreported tip income. You can't electronically file more than...

...features aimed at the professional tax preparer.

New to the program are a client organizer, **client invoice**, instruction letters, and other professional extras. "We've included the ability to print mailing labels... Tax System. But the medium isn't the only message that TAASC is sending this **tax** season. It's improving the **calculation** speed of its software and including a two-year **tax** summary for **comparing** a client's data with last year's return, according to executive vice president Tim...

... program will calculate the correct quarterly estimated payments. The passive activity loss and alternative minimum **tax calculations** have also improved, and the W-2 form provides new income codes for disability pensions...

8/3,K/4 (Item 4 from file: 15)

DIALOG(R)File 15:ABI/Inform(R)  
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00792730 94-42122

**1993 business tax prep software**

Cohn, Michael

Accounting Technology v9n9 PP: 18-31 Nov 1993

ISSN: 0883-1866 JRNL CODE: CIA

WORD COUNT: 8161

...TEXT: Tax\$imple, Inc.

BUSINESS VS, PERSONAL

Accounting Technology (AT): How does software for preparing business **tax** returns **compare** with the programs available for Form 1040?

Petersen (Best Programs): Companies are beginning to realize...Exchange) and OLE (Object Linking and Embedding), if you make any changes in your general **ledger**, they will be **automatically** reflected in your tax program.

Cravens: CD-ROM definitely. Also, I guess the Windows applications...We're just doing enhancements on the billing area, making a few changes on the **client billing** letter. We're not planning a lot of major enhancements because we are preparing ourselves...

**8/3,K/5 (Item 5 from file: 15)**

DIALOG(R)File 15:ABI/Inform(R)

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00767238 94-16630

**MICA IV: Intuitive high-end accounting**

Salmon, Alan

Accounting Technology v9n7 PP: 67-72 Sep 1993

ISSN: 0883-1866 JRNL CODE: CIA

WORD COUNT: 2230

...TEXT: allows multiple cycle billings for each customer. The program handles multiple ship-to addresses, automatic **tax calculations**, and finance charges. It also tracks layaways for retail operations.

MICA will distribute invoices to...

...monitors customer status and reviews sales trends. On-line inquiries let you quickly review a **customer account** at any time.

EZ PAYABLES

The accounts payable module helps you consolidate, pay, and account...cash and payables accounts. And you can process recurring invoices on a specified cycle, and **automatically** create general **ledger** transactions to convert from accrual to cash basis accounting.

MICA keeps a full vendor history...

**8/3,K/6 (Item 6 from file: 15)**

DIALOG(R)File 15:ABI/Inform(R)

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00626026 92-41128

**Tax Preparation Software: An Invaluable Tool That Should be in Every Practitioner's Future**

Waters, Terese  
Tax Adviser v23n7 PP: 419-438 Jul 1992  
ISSN: 0039-9957 JRNL CODE: TAD  
WORD COUNT: 7093

...TEXT: their sophistication increases.

The current levels of automation are defined as:

\* **MANUAL OR COMPUTER-AIDED TAX CALCULATION** : Returns are generally prepared manually but certain calculations for those returns may be done on the **computer** using a **spreadsheet** or another tool.

\* **SERVICE BUREAUS**: Returns are processed off-site. Client data is either entered... selected, missing forms and calculations would have to be completed either manually or with another **computer** system (e.g., **spreadsheets** ).

Proper hardware must be purchased to run an in-house system. These systems run best...following features should be considered.

\* **CALCULATIONS MADE BY THE PROGRAM**: Not every program does every **tax calculation** . State **calculations** are an important aspect to consider. There is no need to buy the most expensive... **MINIMUM PROCESSING SPECIFICATIONS**: The following are the minimum processing characteristics considered acceptable for a computer **tax** return system.

\* The **calculations** done by the system must reflect the present legislative, regulatory and administrative requirements of Federal...

...percentages.

\* A worksheet comparing the various methods (for example, itemized deductions, standard deduction) used to **calculate** income **tax** .

\* The automatic **calculation** of gains and losses, including ordinary income recapture, that results from the sale of depreciable...

...comparisons of current with prior years' data.

\* The ability to produce practice management aids, including **client billings** , mailing labels, etc.

\* The ability to link with other computer applications.

\* A system that meets...

8/3,K/7 (Item 1 from file: 180)

DIALOG(R)File 180:Federal Register

(c) 2003 format only The DIALOG Corp. All rts. reserv.

DIALOG Accession Number: 02290153

Supplier Number: 931101022

**Accounting Requirements for REA Electric Borrowers**

Volume: 58 Issue: 216 Page: 59822

**CITATION NUMBER: 58 FR 59822**

Date: WEDNESDAY, NOVEMBER 10, 1993

TEXT:

... borrowers in the REA program, all REA borrowers must maintain financial records that utilize uniform **accounts** and uniform accounting policies and procedures. The standard REA security instrument requires borrowers to maintain...25 Retained earnings.

1767.26 Operating revenue.

1767.27 Operation and maintenance expenses.

1767.28 **Customer accounts** expenses.

1767.29 Customer service and informational expenses.



1767.30 Sales expenses.  
1767.31 Administrative...

... down or otherwise removing electric plant, including the cost of transportation and handling incidental thereto.

**Customer** is a consumer or patron.

Debt expense includes all expenses incurred in connection with the... earnings accounts.

440-459 Revenue accounts.

500-599 Production, transmission, and distribution expenses.

900-949 **Customer accounts**, customer service and informational, sales, and general and administrative expenses.

(2) In certain instances, numbers...

... 4) The proper entry in each instance must be determined by the texts of the **accounts**.

(f) Extraordinary items. (1) Net income shall reflect all items of profit and loss during...plant accumulated in the work order shall be recorded as a debit in the plant **ledger** of accounts along with the related amount of contributions concurrently be recorded as a credit... Temporary Cash Investments 141 Notes Receivable 141.1 Accumulated Provision for Uncollectible Notes--Credit 142 **Customer Accounts** Receivable 142.1 **Customer Accounts** Receivable--Electric 142.2 **Customer Accounts** Receivable--Other 143 Other Accounts Receivable 144 Accumulated Provision for Uncollectible Accounts--Credit 144.1 Accumulated Provision for Uncollectible **Customer Accounts** --Credit 144.2 Accumulated Provision for Uncollectible Merchandising Accounts--Credit 144.3 Accumulated Provision for... notes previously charged hereto. Concurrent charges shall be made to Account 904, Uncollectible Accounts.

142 **Customer Accounts** Receivable

A. This account shall include amounts due from customers for utility service and for...

...merchandising, jobbing, and contract work.

C. Account 142 shall be subaccounted as follows:

142.1 **Customer Accounts** Receivable--Electric 142.2 **Customer Accounts** Receivable--Other

142.1 **Customer Accounts** Receivable--Electric

This account shall include amounts due from customers for utility service.

142.2 **Customer Accounts** Receivable--Other

This account shall include amounts due from customers for merchandising, jobbing, and contract...

...department.

B. Account 144 shall be subaccounted as follows:

144.1 Accumulated Provision for Uncollectible **Customer Accounts**

--Credit 144.2 Accumulated Provision for Uncollectible Merchandising Accounts--Credit 144.3 Accumulated Provision for...

...144.4 Accumulated Provision for Other Uncollectible Accounts--Credit

144.1 Accumulated Provision for Uncollectible **Customer Accounts**  
--Credit

This account shall be credited with amounts provided for losses on accounts receivable which... taxes payable in the current year of the smaller amount of book income recognized for **tax** purposes as **compared** to the amount recognized in the utility's current accounts with respect to the item... Adjustments, Utility Operations, and Account 411.5, Investment Tax Credit Adjustments, Nonutility Operations, for investment **tax** credits used in **calculating** income taxes for the year when the company's accounting provides for non-deferral of...by such others.

2. Compensation for minor or incidental services provided for others such as **customer billing**, and engineering.

3. Profit or loss on the sale of material and supplies not ordinarily...

8/3,K/8 (Item 2 from file: 180)

DIALOG(R)File 180:Federal Register

(c) 2003 format only The DIALOG Corp. All rts. reserv.

DIALOG Accession Number: 02274118

Supplier Number: 930201997

**Privacy Act of 1974; Reissuance of DOD Systems of Records Notices**

**Volume: 58 Issue: 33 Page: 10002**

**CITATION NUMBER: 58 FR 10002**

Date: MONDAY, FEBRUARY 22, 1993

TEXT:

...categories of users and the purposes of such uses:

To the Internal Revenue Service for **tax** purposes.

To the Department of Justice for assistance in deciding disposition of claims filed against...a fiduciary responsibility on behalf of MI retirees and annuitants.

(d) States and Cities to **verify tax** liability against retiree's state and city income tax returns.

(e) American Red Cross to...in the Health Professions Scholarship Program, tuition payments, individual's military pay records, cost data **worksheets**, active duty military pay vouchers, personal financial history records, monthly payroll listings of current members...

... states and cities/counties which have an agreement with the Department of the Army to **verify tax** liability against member's state and city/county tax returns.

To the Social Security Administration...

...and disposing of records in the system:

Storage:

Paper records in file folders; magnetic tapes; **computer** printouts; microfilm; **ledger** cards.

Retrievability:

By member's name and Social Security Number.

Safeguards:

Information is accessible only... those states and cities which have an agreement with the Department of the Army to **verify tax** liability against members' state and city income tax returns.

Disclosure to consumer reporting agencies:

Disclosure...

...Account.

States and Cities which have an agreement with the Department of the Army to **verify tax** liability against members' state and city income tax returns.

American Red Cross to assist military...published as an appendix to the Army's compilation of systems of records notices.

For **verification** purposes, the individual should provide the full name, Social Security Number, home address, approximate date...

8/3,K/9 (Item 1 from file: 485)

DIALOG(R)File 485:Accounting & Tax DB

(c) 2003 ProQuest Info&Learning. All rts. reserv.

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

00693261

**Norwest Corporation and Subsidiaries, petitioner v. Commissioner of Internal Revenue, respondent**

Anonymous

United States Tax Court Reports v110 n6 PP: 454-530 Jun 1-Jun 30, 1998

JRNL CODE: USTC

WORD COUNT: 28951 LINE COUNT: 2,632

Accounting & Tax DB\_1971-2003/Jun W2

...TEXT: reporting system called Fasttax. The interface was necessary to transfer trust account information to the **tax** system in order to **calculate** the appropriate **tax** and thereafter send that information back to the trust system in order that checks could...over a 9month period) two programs (one each for the Federal Reserve accounts and for **customer accounts** ) that monitored the wire transfers and essentially froze all transfers from an account once the...develop a spreadsheet. The use of C reduced the amount of memory spent by the **computer** in running the **spreadsheet** program, but it was unclear until the project was completed that C would also be...

8/3,K/10 (Item 2 from file: 485)

DIALOG(R)File 485:Accounting & Tax DB

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\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

00516310

**TurboTax ProSeries 1040 for Windows**

Groer, Connie

New Accountant v10 n5 PP: 18-20 Feb 1995

ISSN: 0882-8067 JRNL CODE: ANAC

WORD COUNT: 2016 LINE COUNT: 183

Accounting & Tax DB\_1971-2003/Jun W2

...ABSTRACT: invaluable client-practice aids are incorporated into the program. Most important, the program can prepare **client billings** using flat fees, hourly rates, or perform fees. TurboTax is a powerful program with extra...

...TEXT: a W-2 worksheet to enter detailed information from Forms W-2. The totals from **worksheets** are **automatically** transferred to appropriate places on the Form 1040. When you're finished entering data on...invaluable client-practice aids are incorporated into the program. Most important, the program can prepare **client billings** using flat fees, hourly rates (including multiple rates), or perform fees. Paid-preparer standard data...

...of income sources, deductions, and 'Where your Money Goes' are impressive. A bar graph called **Tax Analysis compares** various taxes like federal, state, real estate, AMT and other. These graphs require no work...

**8/3,K/11 (Item 3 from file: 485)**

DIALOG(R)File 485:Accounting & Tax DB

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**\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\***

00468118

**Windows software packages redesign face of accounting**

Hirsch, A Ethan

Accounting Today v8 n10 PP: 20-21+ Jun 6, 1994

ISSN: 1044-5714 JRNL CODE: ACOY

WORD COUNT: 2975 LINE COUNT: 270

Accounting & Tax DB\_1971-2003/Jun W2

...TEXT: 30 starter data files containing a full chart of accounts and linked accounts.

The general **ledger** supports a four- **digit** account number format, permits companies to define up to 13 periods per year and allows...

...and services with functions that include cash and credit sales, returns and adjustments, automatic sales **tax calculation** and reporting, variable credit terms and onscreen analysis of sales, either by customer, by item...habits. Miscellaneous invoices and returns are entered from the customer module.

The invoicing module processes **customer invoices** and sales returns. It lets users book service and product sales on the same invoice...s designed to include a number of accounts defined as integration accounts into which other **ledgers** and journals **automatically** post entries. Other features include automatic month-and year-end close, and support for prior...

...the open invoice method to track outstanding receivables. Invoicing supports product and service sales, automatically **calculates** sales **tax** and simultaneously adjusts inventory quantities for items sold. Another strong system feature is job cost...

**8/3,K/12 (Item 4 from file: 485)**

DIALOG(R)File 485:Accounting & Tax DB

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\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

00446143

**Accounting with a mouse**

Salmon, Alan

Accounting Today v8 n2 PP: 16-17+ Jan 24, 1994

ISSN: 1044-5714 JRNL CODE: ACOY

WORD COUNT: 2956 LINE COUNT: 269

Accounting & Tax DB\_1971-2003/Jun W2

...TEXT: Reports and batch processing can occur in the background, or can be programmed to run **automatically**.

In the general **ledger** both final and preliminary closes are supported and financial reports are available even though prior...

...access information on line in a variety of ways. For example, to check on a **customer invoice**, you search by customer ID, or part number and immediately see full detail of the...small business.

For example, M.Y.O.B. Payroll has what it calls a smart **tax** engine that automatically **calculates** appropriate payroll taxes based on where the employee lives and works.

Other new features include...

8/3,K/13 (Item 5 from file: 485)

DIALOG(R)File 485:Accounting & Tax DB

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\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

00410364

**Advancements in automation: The annual software review**

Anonymous

Trusts & Estates v132 n6 PP: 8-52 Jun 1993

ISSN: 0041-3682 JRNL CODE: TRE

WORD COUNT: 14831 LINE COUNT: 1,348

Accounting & Tax DB\_1971-2003/Jun W2

...TEXT: investment managers and other tax specialists. Items include trust accounting systems, databases, planning aids and **tax calculation** programs, and software matching services.

Each entry contains the name of the product or service...Funds, Flexible International Date Formats and Managed Portfolio of Assets with Various Currencies. Bank Reporting, **Customer Accounts** and Asset Portfolios may each be in a different currency base. Incorporates comprehensive password system...schedules, including extension and 709-A (short form). In addition, the preparer can produce a **Client Billing** statement and Transmittal letter to accompany the return.

\* CASE/COMPUTERIZED ACCOUNTING SYSTEM FOR ESTATES & TRUSTS...finger tips in seconds with the latest tax tables and variable Federal AFR rates. The **tax** analysis program **compares** the **tax** implication of no charitable gift, regular tax with charitable gift and AMT with gift. EZ Gift is the complete answer to **calculations** for income **tax**, capital gains **tax**, charitable gift and the alternative minimum tax.

\* DEFINED CONTRIBUTION RECORDKEEPING AND ADMINISTRATION Federated Investors, Federated...

...produce an assortment of customized reports consisting of full-color graphs, family needs evaluations and **tax calculations**, based upon an analysis of the client's financial profile. FDP/XL2 produces quality sales ...allocation of dividends, common fund accounting, check-writing, dual fiscal year processing, perpetual investment history, **client billing**,

on-line access to all data, automated security pricing using Dow Jones. Reports include: account...used totally in-house. The trust department uses a standard PC and laser printer to **calculate** and print the **tax** returns. The package gives the tax return preparer total control of the return preparation process...

...deductions and it will compute the complete tax return. 1041 Plus is a fiduciary income **tax** program that **calculates** allowable miscellaneous itemized deductions, adjustments required by tax exempt interest, DNI to tier one and...call (800) 458-8811.

Five integrated software programs automate tax preparation and administration. Federal Estate **Tax** Returns: Automatically **calculates** and prepares Form 706 and all associated schedules. Calculates complex interrelated, marital, charitable deductions, special...

...calculations such as Forms 1041ES, 1041T, 2210, 4797, 4835, 4952, 8582 and 8656. Federal Gift **Tax** Returns: **Calculates** and prints Form 709, Schedules A, B and C, performs interrelated net gift calculations, automatically...information reporting capabilities. A superior marketing tracking system aids marketers and allows easy access to **customer account** and personal data. The system handles all accounting functions, while providing management, marketing, operations and...system for defined contribution and 401K plans. The system offers unlimited participants, multi-terminal environments, **tax** reporting, system **calculated** eligibility, vesting and comprehensive compliance testing. System Requirements: IBM personal computer, IBM DOS 5.0...describe the impact of estate taxes on your client's plan. EPLAN performs all interrelated **calculations**, including interest on estate **tax** deficiencies, Sec. 6166 deferrals and marital and charitable deductions.

EPLAN reports show what each beneficiary...

...chart comparison of liquidity funding options, ability to show estate growth; and all state death **tax calculations**. Generation Skipping software available. IBM and network compatible. Priced below \$700.

\* BENEQUICK 1.0 ViewPlan...

...monitoring, tax lot accounting and reporting, cash management sweeps, common trust fund management, departmental general **ledger** maintenance, **automatic** remittances and **customer / account** relationships. VTAS is a multi-currency, multi-lingual and multi-branch system fully integrated in  
...  
?

8/3,K/1 (Item 1 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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01079199 97-28593

**Tax Suite with a Windows view**

Cohn, Michael

Accounting Technology v11n7 PP: 6-10 Aug 1995

ISSN: 0883-1866 JRNL CODE: CIA

WORD COUNT: 2228

...TEXT: SunSystems Gold. The Accounts Receivable Gold module adds recurring invoices and drill-down inquiries into **customer accounts**. Accounts Payable Gold provides MICR-encoded check-printing, bank validation security for electronic payments, and drill-down inquiries into vendor accounts. General **Ledger** Gold offers **automatic** bank reconciliation and an interface to consolidation products like Hyperion Software's MicroControl.

Gold Pack...

8/3,K/2 (Item 2 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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00914269 95-63661

**Dealing with dollars**

Sanner, J David

Security Management v38n9 PP: 108-109 Sep 1994

ISSN: 0145-9406 JRNL CODE: SEM

WORD COUNT: 968

...TEXT: If the security department provides services to outside clients, the budget must include information concerning **client billings** and collections. If activities are internal only, the security department may have no income, or...

... categories and trends. If managers enter this year's budget on the same paper or **computer worksheet** with the preceding year's report, comparisons are more easily made.

In referring to the...

8/3,K/3 (Item 3 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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00785570 94-34962

**A ROM with a view**

Haynes, Jim

Office Systems v10n10 PP: 24-30 Oct 1993

ISSN: 8750-3441 JRNL CODE: OFS

WORD COUNT: 1930

...TEXT: each, greatly speeding its location.

One long-distance telephone company delivers some of its larger **customers** ' **invoices** on CDs rather than on hundreds or thousands of pieces of paper. A vice-president...

...done very quickly." Because the statements on CDs are in digital format, customers can do **computerized** key-word searches, **spreadsheet** analyses and graphing and charting, using information directly from CDs.

More and more uses are...

8/3,K/4 (Item 4 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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00518115 90-43872

**Electronic Trading: The Bulls & Bears Come Out at Night**  
Schmerken, Ivy  
Wall Street Computer Review v7n12 PP: 14-22, 62-77 Sep 1990  
ISSN: 0738-4343 JRNL CODE: WSC

...ABSTRACT: clearance, and settlement in a continuous closed loop linked to the back-office posting of **customer accounts** and report generation. This is an attempt to eliminate the specialists who carve a profit...

... floor. The so-called informationless trades exploit market inefficiencies via computer-driven research linked to **spreadsheets** and **automated** execution systems. With automated trading systems, order flow can be moved away from a centralized...

8/3,K/5 (Item 5 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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00232254 84-10815

**Cashing In on a PC**  
Anonymous  
Modern Office Technology v29n3 PP: 117-120, 124 Mar 1984  
ISSN: 0026-8208 JRNL CODE: MOP

...ABSTRACT: a word processing (WP) program to make the report more presentable. Ball uses Plan80, an **electronic spreadsheet** from Business Planning Systems and dBase II from Ashton Tate. The dBase II handles bookkeeping, office management, calendaring, and keeps track of **client accounts**. Ball chose Spellbinder LexiSoft Inc. for WP requirements. The Memo File stores the client's...

8/3,K/6 (Item 1 from file: 20)  
DIALOG(R)File 20:Dialog Global Reporter  
(c) 2003 The Dialog Corp. All rts. reserv.

06438419

**Stock Exchange involvement in the development of state bonds secondary market**  
ROMANIAN BUSINESS JOURNAL  
June 04, 1999  
JOURNAL CODE: WRBJ LANGUAGE: English RECORD TYPE: FULLTEXT  
WORD COUNT: 1578

...a separate account for each of its customers. In its own account or in the **customer account** the intermediaries will record (separately) the deposits for each emission. The minimal information to be...

8/3,K/7 (Item 1 from file: 813)  
DIALOG(R)File 813:PR Newswire  
(c) 1999 PR Newswire Association Inc. All rts. reserv.

0567106 NY024  
**MOST COMPANIES NEED COMPUTER-LITERATE EMPLOYEES, BUT TRAINING AND TESTING**



FOR COMPUTER SKILLS LAG

DATE: February 18, 1993

10:51 EST

WORD COUNT: 632

...North

America, which employ 390,000 assignment employees and caregivers serving more than 185,000 **client accounts** . Founded in 1950, the company is headquartered in Westbury, N.Y. Olsten serves the computer...

...hands-on, PC-based system

for evaluation, training, and on-the-job support for office **automation** and **spreadsheets** . The Precise system evaluations are the only evaluations of its kind validated by the Educational...

12/3,K/1 (Item 1 from file: 15)  
DIALOG(R)File 15:ABI/Inform(R)  
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02410755 156075381

**Leading low-end accounting software**

Basile, Anthony; Papa, Louis J; Johnston, Randy

CPA Journal v72n8 PP: 40-49 Aug 2002

ISSN: 0732-8435 JRNL CODE: CPA

WORD COUNT: 4551

...TEXT: orders; allows quotes to be converted into sales orders or invoices; supports credit card sales; **calculates** sales **tax** and freight automatically; creates customer terms and discounts automatically; tracks **customer accounts** ; and generates customer statements with interest. Its purchases and payments feature processes invoices, prints purchase...

File 344:Chinese Patents Abs Aug 1985-2003/Mar  
 (c) 2003 European Patent Office  
 File 347:JAPIO Oct 1976-2003/Feb(Updated 030603)  
 (c) 2003 JPO & JAPIO  
 File 350:Derwent WPIX 1963-2003/UD,UM &UP=200337  
 (c) 2003 Thomson Derwent  
 File 348:EUROPEAN PATENTS 1978-2003/Jun W01  
 (c) 2003 European Patent Office  
 File 349:PCT FULLTEXT 1979-2002/UB=20030605,UT=20030529  
 (c) 2003 WIPO/Univentio

?ds

Set	Items	Description
S1	5	AU='JOHNSON RONALD M':AU='JOHNSON RORY MATTHEW'
S2	0	S1 AND TAX?
S3	15	AU='HANNERS':AU='HANNERS JOHN L'
S4	0	S3 AND TAX?
?		

File 344:Chinese Patents Abs Aug 1985-2003/Mar  
(c) 2003 European Patent Office  
File 347:JAPIO Oct 1976-2003/Feb(Updated 030603)  
(c) 2003 JPO & JAPIO  
File 350:Derwent WPIX 1963-2003/UD,UM &UP=200337  
(c) 2003 Thomson Derwent

?ds

Set	Items	Description
S1	470	(CUSTOMER? OR CLIENT?) ( ) (BILL? ? OR INVOICE? OR ACCOUNT OR ACCOUNTS OR BILLING? OR CHARGE? ?) OR HOLD ( ) BILL?
S2	3800336	(ELECTRONIC OR AUTOMAT? OR DIGIT? OR COMPUTER? OR MECHANIZ? OR MECHANIS?)
S3	333	S2 (3N) (SPREADSHEET? OR LEDGER? OR WORKSHEET? OR (SPREAD OR WORK) ( ) SHEET?)
S4	460	(CALCULAT? OR VERIF? OR COMPAR?) (5N) (TAX? ? OR TAXATION?)
S5	0	S1 AND S3
S6	3	S1 AND (SPREADSHEET? OR LEDGER? OR WORKSHEET? OR (SPREAD OR WORK) ( ) SHEET?)
S7	0	S6 AND S4
S8	0	S1 AND S4

6/5/1 (Item 1 from file: 347)  
DIALOG(R)File 347:JAPIO  
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01284974 \*\*Image available\*\*  
PROCESSING SYSTEM OF PAYING-IN AND PAYING-OUT

PUB. NO.: 58-222374 [JP 58222374 A]  
PUBLISHED: December 24, 1983 (19831224)  
INVENTOR(s): YOSHIMOTO TAKAYUKI  
APPLICANT(s): FUJITSU LTD [000522] (A Japanese Company or Corporation), JP  
(Japan)  
APPL. NO.: 57-106386 [JP 82106386]  
FILED: June 21, 1982 (19820621)  
INTL CLASS: [3] G06F-015/30; G07D-009/00  
JAPIO CLASS: 45.4 (INFORMATION PROCESSING -- Computer Applications); 29.4  
(PRECISION INSTRUMENTS -- Business Machines)  
JAPIO KEYWORD: R087 (PRECISION MACHINES -- Automatic Banking)  
JOURNAL: Section: P, Section No. 267, Vol. 08, No. 79, Pg. 54, April  
11, 1984 (19840411)

#### ABSTRACT

PURPOSE: To improve the processing efficiency, by registering an account file of plural customers in advance and revising the account file of each customer in the lump, when payment-in and out takes place.

CONSTITUTION: When employees of a company subscribe to a group fixed amount accumulating deposit system, a processing request data I(sub 1) is outputted from a terminal device 1 to request the registration of a **customer account** in a processor 2. The data I(sub 1) comprises account numbers A-Z of customers a-z, number of items of customers C, incoming data E by customers and total monetary amount D of the incoming data. A receiving section 3 receiving the data I(sub 1) starts an account set section 4 to open a register file 8 and sets the account number A-Z to an account column (e) and the deposit amount per month determined by customers to a monetary amount column (f). Further, a managing file 9 is provided to set the number of items of customers and the total amount of money and a **ledger** file 7 is opened. When paying-in is done from each customer, the receiving section 3 starts a collecting section 5 with a processing request data I(sub 2) from the terminal device 1 to collates the data I(sub 2) with the data of the file 9, and when they are coincident, an incoming money processing section 6 is started for proceeding the incoming process.

6/5/2 (Item 1 from file: 350)  
DIALOG(R)File 350:Derwent WPIX  
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014395982 \*\*Image available\*\*  
WPI Acc No: 2002-216685/200227  
XRPX Acc No: N02-166156

**Web-enabled Accounts Receivable System (ARS) for managing various related functions such as credit granting, collection and dispute management, consists of the ARS being coupled to a database and receiving information from a client system**

Patent Assignee: GEN ELECTRIC CAPITAL EQUIP FINANCE INC (GENE )  
Inventor: GETGOOD A; LAND D  
Number of Countries: 023 Number of Patents: 002  
Patent Family:

Patent No	Kind	Date	Applicat No	Kind	Date	Week
WO 200184389	A2	20011108	WO 2001IB919	A	20010430	200227 B
AU 200158683	A	20011112	AU 200158683	A	20010430	200227

Priority Applications (No Type Date): US 2000561654 A 20000502  
Patent Details:

Patent No Kind Lan Pg Main IPC Filing Notes  
WO 200184389 A2 E 59 G06F-017/60  
Designated States (National): AU CA JP MX  
Designated States (Regional): AT BE CH CY DE DK ES FI FR GB GR IE IT LU  
MC NL PT SE TR  
AU 200158683 A G06F-017/60 Based on patent WO 200184389

Abstract (Basic): WO 200184389 A2

NOVELTY - The method for managing trade receivables credit and collection services using an accounts receivable system (10) coupled to a database (94) comprises the steps of : receiving (920) information from a client system (14) ; extracting (940) data from the information and loading (950) into the database.

DETAILED DESCRIPTION - The credit information pertaining to the customer is then received and credit is evaluated through an electronic scoring process. A payment is accepted against the **customer account** for processing and generating journal entries (462) to post on a client's general **ledger** (180) for financial monitoring, reporting and auditing purposes. An INDEPENDENT CLAIM is made for an accounts receivable computer program.

USE - Web-enabled Accounts Receivable System (ARS) for managing various related functions such as credit granting, collection and dispute management.

ADVANTAGE - The system includes five modules which include a Credit Inquiry Module, a Remittance Processing Module, an Accounts Receivable Claim Module, a Maintenance Module, and an Administration Module. These modules are integrated with each other and are capable of interfacing with a client's Order, Ship, Bill (OSB) system for smooth functioning. The ARS is further capable of automatically upgrading the software and systems templates to the client by downloading on a real time basis as they are being implemented at a central site and as called for by a user. The ARS's interface capabilities involve interfacing with the Order, Ship, Bill (OSB) system for credit approval and order processing. The ARS further provides several methods for exchanging trade payment and credit information with outside credit bureaus/sources. The ARS includes built-in methods for report extraction and creation to get the data required for particular situations or clients. Reports and files can be delivered using various methods such as file transfers, email, hard copy and web site access. The ARS provides a way of updating various data during a nightly batch process. Many file transfers and reporting procedures are also automatically done during the batch process.

DESCRIPTION OF DRAWING(S) - The drawing shows a process flowchart for the ARS.

accounts receivable system (10)  
Client system (14)  
Database (94)  
Data Receipt (920)  
Data extraction (940)  
Data loading (950)  
pp; 59 DwgNo 23/23

Title Terms: WEB; ENABLE; ACCOUNT; RECEIVE; SYSTEM; MANAGE; VARIOUS;  
RELATED; FUNCTION; CREDIT; COLLECT; MANAGEMENT; CONSIST; COUPLE; DATABASE  
; RECEIVE; INFORMATION; CLIENT; SYSTEM

Derwent Class: T01

International Patent Class (Main): G06F-017/60

File Segment: EPI

6/5/3 (Item 2 from file: 350)  
DIALOG(R)File 350:Derwent WPIX  
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011154938 \*\*Image available\*\*  
WPI Acc No: 1997-132862/199712

Related WPI Acc No: 1998-457342

XRFX Acc No: N97-109643

**Automated fund transfer method for transferring funds between accounts -  
transferring funds to account based on customer information which can be  
automatically accessed by system**

Patent Assignee: CITIBANK NA (CITI-N)

Inventor: DO K; DOWNING J; GOODHAND N; JENNINGS H; MAINO M; PINNELL N;  
PROFUMO M; SHAH V; THOMPSON M H

Number of Countries: 064 Number of Patents: 012

Patent Family:

Patent No	Kind	Date	Applicat No	Kind	Date	Week
WO 9704411	A1	19970206	WO 96US12132	A	19960723	199712 B
AU 9665951	A	19970218	AU 9665951	A	19960723	199723
ZA 9606284	A	19970430	ZA 966284	A	19960724	199723
US 5659165	A	19970819	US 95505886	A	19950724	199739
EP 842480	A1	19980520	EP 96925437	A	19960723	199824
			WO 96US12132	A	19960723	
CN 1196809	A	19981021	CN 96197081	A	19960723	199910
HU 9802405	A2	19990301	WO 96US12132	A	19960723	199916
			HU 982405	A	19960723	
AU 706845	B	19990624	AU 9665951	A	19960723	199936
JP 11510278	W	19990907	WO 96US12132	A	19960723	199947
			JP 97506958	A	19960723	
MX 9800699	A1	19980801	MX 98699	A	19980123	200014
KR 99035877	A	19990525	WO 96US12132	A	19960723	200032
			KR 98700538	A	19980123	
HU 221354	B1	20020930	WO 96US12132	A	19960723	200272
			HU 982405	A	19960723	

Priority Applications (No Type Date): US 95505886 A 19950724

Cited Patents: US 3826344; US 4707592; US 4766293; US 4773001; US 4926368;  
US 5367561; US 5455407; US 5524073

Patent Details:

Patent No	Kind	Lan Pg	Main IPC	Filing Notes
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WO 9704411	A1 E	90	G06F-017/60	
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Designated States (National): AM AT AU BB BG BR BY CA CH CN CZ DE DK EE  
ES FI GB GE HU JP KE KG KP KR KZ LK LR LT LU LV MD MG MN MW MX NO NZ PL  
PT RO RU SD SE SI SK TJ TT UA UZ VN

Designated States (Regional): AT BE CH DE DK ES FI FR GB GR IE IT KE LS  
LU MC MW NL OA PT SD SE SZ UG

AU 9665951	A			Based on patent WO 9704411
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ZA 9606284	A	92	G06F-000/00	
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US 5659165	A	30		
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EP 842480	A1 E			Based on patent WO 9704411
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Designated States (Regional): AT BE CH DE DK ES FI FR GB GR IE IT LI LU  
MC NL PT SE

HU 9802405	A2			Based on patent WO 9704411
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AU 706845	B			Previous Publ. patent AU 9665951
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Based on patent WO 9704411

JP 11510278	W	63	G06F-019/00	Based on patent WO 9704411
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KR 99035877	A		G06F-017/60	Based on patent WO 9704411
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HU 221354	B1		G06F-017/60	Based on patent WO 9704411
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Abstract (Basic): WO 9704411 A

The method for transferring (28) funds instantly to an account (30) such that the funds are available to the beneficiary at the time they are sent, involves using customer information (24) which can be automatically accessed by the system (20). The appropriate exchange rate and any fees to be charged to the account (26) are automatically computed and displayed to the user such that the user may authorise or cancel the transaction (22).

The user is also able to quantify the amount to be transferred in the currency of the originating account or the currency of the receiving account. Safeguards are provided to ensure that only authorised individuals have access to the accounts (32) and the funds,

and immediate verification of successful completion or failure is made to the customer.

USE - Performing money transfers between financial institutions for credit to general **ledger** or **customer accounts** , in real time and in secure manner.

ADVANTAGE - Enables user to quantify amount to be transferred in currency of originating account or of receiving account, to maximise system flexibility

Title Terms: AUTOMATIC; FUND; TRANSFER; METHOD; TRANSFER; FUND; ACCOUNT; TRANSFER; FUND; ACCOUNT; BASED; CUSTOMER; INFORMATION; CAN; AUTOMATIC; ACCESS; SYSTEM

Derwent Class: T01

International Patent Class (Main): G06F-000/00; G06F-017/60; G06F-019/00

International Patent Class (Additional): G07F-019/00

File Segment: EPI



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(FILE 'HOME' ENTERED AT 13:52:31 ON 13 JUN 2003)

FILE 'CONFSCI' ENTERED AT 13:52:43 ON 13 JUN 2003

L1 0 S (CUSTOMER? OR CLIENT?) () (BILL? OR INVOICE? OR ACCOUNT OR ACCO

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File 344:Chinese Patents Abs Aug 1985-2003/Mar  
 (c) 2003 European Patent Office  
 File 347:JAPIO Oct 1976-2003/Feb(Updated 030603)  
 (c) 2003 JPO & JAPIO  
 File 350:Derwent WPIX 1963-2003/UD,UM &UP=200337  
 (c) 2003 Thomson Derwent  
 File 348:EUROPEAN PATENTS 1978-2003/Jun W01  
 (c) 2003 European Patent Office  
 File 349:PCT FULLTEXT 1979-2002/UB=20030605,UT=20030529  
 (c) 2003 WIPO/Univentio

?ds

Set	Items	Description
S1	5	AU='JOHNSON RONALD M':AU='JOHNSON RORY MATTHEW'
S2	0	S1 AND TAX?
S3	15	AU='HANNERS':AU='HANNERS JOHN L'
S4	0	S3 AND TAX?
?		